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INPUT[®]



The marketing challenges
of the 1990s

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EUROPEAN SOFTWARE AND SERVICES MARKET STUDIES

The marketing challenges of the 1990s

In today's fast-moving and competitive software and services industry, it is becoming increasingly difficult to keep up-to-date with the latest issues and trends in the marketplace and to keep abreast of developments from the competition. Executives and managers are under increasing pressure to gain insight into the market, track user trends, collect market size data and position their companies against the competition.

INPUT's reports on the software and services industry can help meet these challenges. Each report covers the European market and contains five-year market forecasts, discusses key trends and issues, and identifies and ranks leading vendors.

In addition to these reports, INPUT provides annual subscription services whereby clients regularly receive reports, bulletins, and advice and can attend informal meetings to discuss specific sectors of the industry.

INPUT is an international research and consulting company specialising in tracking developments in the computer software and services industry. Clients include over 100 of the world's most technically advanced companies, including Digital, IBM, Unisys, Bull, Olivetti, SD-Scicon, CAP Gemini Sogeti, Sema Group, Finsiel and Sligos.

To order the reports, please complete and return the order form, or contact your nearest INPUT office listed on the back of this brochure.

Software and Services Market Reports

Market Sector Reports

The Western European Market for Computer Software and Services, 1990-1995
(January 1991)

MEPOE

This report summarises the market forecasts for the software and services sector, which comprises applications software, turnkey systems, processing services, systems software, network-based services, systems operations and systems integration.

The Western European Market for Computer Software and Services, 1991-1996
(available quarter 4 1991)

MEMO1

This report summarises the market forecasts for the software and services sector, which comprises applications software, turnkey systems, processing services, systems software, network-based services, systems operations and systems integration. It provides market sizes for 1990, with forecasts for the 1991-1996 period, and also provides a breakdown of the market by country. Each delivery mode is segmented into subsectors.

Trends in Processing Services Western Europe, 1990-1995
(December 1990)

MEPOE

The processing services sector has had the lowest growth rate of the delivery modes throughout the 1980s within an otherwise dynamic and quickly expanding market for software and services. However, specialised applications continue to evolve to offer vendors some important opportunities. This report can help vendors identify these opportunities and offers recommendations to vendors on how best to exploit them.

Processing Services Opportunities—Western Europe 1991-1996
(available quarter 4 1991)

MEPRI

There will be a major restructuring of the transaction processing market over the next decade. This report will help vendors understand what changes are taking place and how they are affecting businesses. Research shows that there are significant opportunities available for vendors despite a decline in growth rate. The report provides market forecasts and vendor rankings, with percentage market shares for each vendor.

Professional Services Opportunities, 1990-1995
(January 1991)

MEROE

This report provides market forecasts and growth rates and assesses the impact of the trends in the marketplace on professional services vendors.

Professional Services Opportunities—Western Europe 1991-1996
(available quarter 4 1991)

MEPS1

This report provides market forecasts and growth rates for the European professional services market and assesses the impact of the trends in the marketplace on professional services vendors. It also discusses users' concerns and requirements so that vendors can evaluate their own strengths and weaknesses. The report identifies leading vendors and provides valuable competitive information.

European Software Applications Solutions Opportunities 1990-1995
(March 1991)

MEA0E

The challenge for vendors of software application solutions in the 1990s is to provide integrated products and pan-European support. This report forecasts the size of the market and identifies the fastest-growing markets. It discusses the opportunities for vertical market products, cross-industry market products, application software products and turnkey systems. It also discusses market issues, such as industry standards, quality and integration.

**European Software Applications
Solutions Opportunities
1991-1996**
(available quarter 4 1991)

MEAS1

This report forecasts the size of the applications solutions market, identifies the leading vendors and discusses the trends affecting the market in each European country. It discusses the opportunities for vertical market products, cross-industry market products, application software products and turnkey systems. It discusses market issues, such as industry standards, quality and integration. The report provides valuable market intelligence for companies involved in selling and marketing software products.

**Systems Software Products
Western Europe, 1990-1995**
(March 1991)

MEYOE

This report examines the market for systems software products, segmented into systems control products, application development tools and data centre management products. The report discusses trends, such as the move towards distributed processing, and assesses the likely effect on the systems software market. The impact of open systems is also discussed.

**Systems Software Products
Western Europe, 1991-1996**
(available quarter 3 1991)

MEYS1

This report examines the market for systems software products, segmented into systems control products, application development tools and data centre management products. The report discusses trends, such as the move towards distributed processing, and assesses the likely effect on the systems software market. The impact of open systems is also discussed. Companies offering systems software products can find in this report valuable market size and growth data, analysis and competitive information.

Industry Sector Reports

**European Software and Services
Market, 1990-1995**
Insurance Sector
(June 1990)

MEIIO

European insurance companies are being forced to fundamentally rethink their whole approach to information systems as they face the need to create fully electronic systems to compete effectively in the 1990s. This is leading to an increased demand for software and services, which is creating opportunities for vendors offering networking services, specialised software packages and professional services. In the insurance sector report, INPUT breaks down the market into life, non-life and reinsurance and discusses the opportunities available in each sector. Regulatory issues affecting the market are discussed, and there is a review of merger and acquisition activity, which is one of the driving forces in the market for software and services in this sector.

**European Software and Services
Market, 1991-1996**
Insurance Sector
(available quarter 3 1991)

MEIII

In the insurance sector report, INPUT breaks down the market into life, non-life and reinsurance, and discusses the opportunities available in each sector. Regulatory issues affecting the market are discussed, and there is a review of merger and acquisition activity, which is one of the driving forces in the market for software and services in this sector. Software and services vendors in this sector can gain an accurate overview of the European market for their services in the insurance sector.

**European Software and Services Market, 1990-1995
Banking and Finance Sector**
(July 1990)

MEIBO

Financial markets will be deregulated by 1993, and this is forcing banking and finance institutions to restructure and at the same time, develop new competitive products and services. INPUT's banking and finance sector report explains how banking and finance markets are restructuring and details how this will affect software and services vendors. The report contains detailed market forecasts, profiles leading vendors and recommends vendor strategies for the 1990s in this fast-growing sector.

**European Software and Services Market, 1991-1996—
Banking and Finance Sector**
(available quarter 3 1991)

MEIB1

INPUT's banking and finance sector report explains how banking and finance markets are restructuring and details how this will affect software and services vendors. The report contains detailed market forecasts, profiles leading vendors and recommends vendor strategies for the 1990s in this fast-growing sector.

European Software and Services Market, 1990-1995—Discrete Manufacturing Sector
(January 1991)

MEIDO

Although the determinants of success in discrete manufacturing vary from sector to sector, the need to reduce costs and to improve product quality remain. In addition, a heavy emphasis is now being placed on lead times—for product introduction and order fulfillment—and on increased flexibility of output. INPUT's discrete manufacturing sector report evaluates the impact of these trends on the software and services market. The report contains detailed market forecasts and identifies the key opportunities available.

European Software and Services Market, 1991-1996—Discrete Manufacturing Sector
(available quarter 2 1991)

MEID1

INPUT's discrete manufacturing sector report evaluates the impact of trends in the manufacturing sector on the software and services market. Software and services vendors active in the manufacturing sector will find that this report provides them with detailed market forecasts, identifies the leading vendors and the key opportunities available. The report can make a valuable contribution to vendor companies' strategic planning.

European Software and Services Market, 1990-1995—Process Manufacturing Sector
(January 1991)

MEIPO

This report examines the issues and trends in the process manufacturing sector and assesses their impact on the software and services market. The report contains detailed five-year market forecasts and identifies the key opportunities available.

European Software and Services Market, 1991-1996—Process Manufacturing Sector
(available quarter 4 1991)

MEIP1

This report examines the issues and trends in the process manufacturing sector and assesses their impacts on the software and services market. The report will help vendor companies, and those considering entering the market, to plan their future strategies by providing detailed five-year market forecasts and identifying the key opportunities available.

European Software and Services Market, 1990-1995—Retail and Wholesale Distribution Sector
(December 1990)

MEIRO

This report finds that investment in software and services in the distribution sector is being driven by supply chain cost savings. Changing business practices and the use of scanning electronic point of sale terminals are creating demand for new applications. This report describes the trends in the market and offers guidelines to software and services vendors on how to make the most of the opportunities available.

European Software and Services Market, 1991-1996—Retail and Wholesale Distribution Sector
(available quarter 3 1991)

MEIR1

This report analyses the market for software and services in the distribution industries of Western Europe. Software and services vendors can find out what the major trends, issues and opportunities are, and are provided with market forecasts for wholesale and retail activities in France, Germany, Spain, the U.K., and the rest of Europe.

Topic Reports

Education and Training
(available quarter 3 1991)

MEET1

This report surveys developments in education and training in the software and services industry, examining issues such as skills shortages and retraining. This report can help vendors of education and training services assess the level of interest in various types of training services by examining the requirements for training and providing data on levels of satisfaction with training standards. The report also highlights differences in European countries, and discusses governmental issues.

Software Applications Maintenance
(available quarter 2 1991)

MESM1

This report examines the specific area of user-written software applications maintenance. It identifies the business opportunities in this rapidly developing business sector of the professional services market. The report also addresses such issues as the use of reverse engineering tools and provides market sizing and competitive information.

UNIX Market Opportunities
(available quarter 2 1991)

MEUM1

UNIX has become an important operating system as suppliers move away from their own proprietary systems. This report examines the opportunities being created in this market for consulting services and other professional services, software products and related areas. The report provides European country market analyses and competitive information.

Collaboration and M & A Issues
(available quarter 3 1991)

MECO1

As European software and services companies plan their business strategies for the 1990s, many are entering new markets by entering into partnerships and through acquisition activity. As companies compete against pan-European giants in a single market, it is becoming essential for them quickly to acquire market penetration into new countries, or to be able to offer new skills. This can be achieved by establishing partnerships or by seeking to acquire companies already operating in target markets. This report examines the issues and discusses the implications of such strategic activity.

Customer Services Reports

Market Analysis Reports

Western European Customer Services Market Analysis and Forecast, 1990-1995
(January 1991)

CESMO

This report analyses and forecasts user expenditures for customer services in Western Europe. Revenue figures are split by vendor type (equipment vendors, TPM vendors, dealers and distributors), by service sector (hardware service, software support, professional services, dealers and distributors), by size and by country. Leading vendors are ranked by revenues, enabling customer service organisations to assess their market position.

Western European Customer Services Market Analysis and Forecast, 1991-1996
(available quarter 4 1991)

CESM1

This report surveys the market for customer services and forecasts user expenditures on equipment and systems software maintenance, professional services and education and training associated with equipment and systems software. The report enables customer services executives to size the market and gain valuable knowledge about differences between countries, and differences in spend among various market sectors.

Independent Maintenance Western Europe, 1990-1995
(July 1990)

CEIMO

The next decade is crucial for independent maintenance vendors. They are still gaining market share, but as newer and more reliable equipment leads to a decline in service revenues from computer maintenance, independent vendors will have to be able to offer services such as software support, environmental services, and network servicing in order to maintain growth rates. This report recommends a strategy for equipment vendors, gives market sizes and profiles over 60 leading European independent maintenance vendors.

Independent Maintenance Western Europe, 1991-1996
(available quarter 2 1991)

CEIM1

Independent maintenance vendors are still gaining market share, but as service revenues from equipment maintenance decline, independent vendors face the challenge of creating alternative, higher-growth revenue streams. This report is crucial for independent maintenance and equipment vendors to gain valuable competitive information and an informed view of the future market directions for independent maintenance companies. The report profiles leading independent maintenance companies, sizes the market and discusses market penetration trends.

User Trends and Issues Reports

Customer Services Annual Reports, 1990
(February 1991)

CEUSO, UMO, UPO

A separate annual report is available for each of three sectors—large systems, medium systems, and PCs and workstations. The reports provide valuable insights into client satisfaction levels with a range of service elements. The reports assess trends by country and by vendor and analyse strengths and weaknesses of customer service. The data for these reports comes from over 1,600 user interviews in Europe.

Customer Services in Western Europe, 1991—User Satisfaction Analysis

(available quarter 4 1991)

CEUS1, UM1, UP1

This set of three reports, covering large systems, medium systems and PCs and workstations, gives customer services executives valuable data on user satisfaction. In 1990, INPUT surveyed well over 1,000 users in Europe. The reports allow vendors to make comparisons with other vendors' ratings and overall European ratings, and also allow for comparisons with the previous year's results.

Customer Services in Western Europe 1991-1996—User Issues
(available quarter 3 1991)

CETS1, TM1, TP1

This companion set of reports builds upon INPUT's extensive user research to highlight issues in European customer services. Three volumes, covering large systems, medium systems and PCs and workstations, provide analysis of clients' attitudes and concerns. The reports provide valuable evaluation of the issues and give advice and recommendations to vendors based upon the European survey of over 1,000 customer service users.

Pricing Issues and Trends in Western European Customer Services

(December 1990)

CEPRO

A critical task for the service vendor is to balance service quality with the price users are prepared to pay for it. This report examines the issues and trends in European customer service pricing and assists vendors in planning effective pricing strategies for the 1990s.

The Challenge of Network Service in Customer Services
(May 1990)

CESIN

Data communications networks continue to become more critical to user support organisations, but the service and support necessary to maintain uptime and accessibility remains fragmented. This report provides service vendors with the information they need to help plan strategies for implementing a successful service offering. The report gives market sizes and forecasts, reveals user needs and discusses vendor issues and the opportunities available.

Professional Services Reports

Systems Support Opportunities for Customer Services—Western Europe, 1990-1995

(August 1990)

CEPRS

Systems operations (facilities management) and disaster recovery markets can provide the key to combatting declining equipment maintenance revenue growth. This report examines these markets, giving market size and penetration by major European country, proposes a strategy for entering these markets and identifies companies already active in systems operations and disaster recovery.

Environmental Services for Western European Customer Services Vendors, 1991-1996
(available quarter 2 1991)

CEES1

This report assists customer services organisations that are already involved in providing environmental services or that are considering entering the market. Many customer services vendors are broadening their service portfolios, offering services such as structured wiring, air conditioning and power sources. This is creating an important alternative revenue stream. The report helps vendors consolidate their positions by defining and sizing the market and discussing the opportunities available. User and vendor issues are discussed.

**Systems Operations for
Customer Services Vendors in
Western Europe, 1991-1996**
(available quarter 4 1991)

CES01

As a high-growth area, this market provides customer service vendors with an opportunity to regain some of the lost revenues caused by a slowdown in growth from equipment maintenance revenues. The report sizes the market in Europe and identifies vendors already active in this area. It recommends strategies for vendors to enter the market and contains discussion on user issues so that executives can target the opportunities effectively.

**Channel Support Issues in
Western European Customer
Services, 1991-1996**
(available quarter 2 1991)

CECS1

As more and more sales are derived from indirect channels, important issues are raised. One major concern is that VARs, dealers and distributors are selling equipment without necessarily having the expertise to support it. This often results in users' becoming isolated from the equipment vendors. This report will assist equipment vendors and third-party organisations in avoiding some of the pitfalls in supporting their users and recommends strategies for increasing user satisfaction with service.

**Software Support Issues in
Western European Customer
Services, 1991-1996**
(available quarter 2 1991)

CESW1

Customer services vendors need to extend their levels of software support as they widen their portfolio of services. This report examines the issues of providing full software support for both systems and applications software. The report can help customer services organisations plan their future strategies for providing full software support by discussing the skill requirements needed, user expectations, and the future direction of software support services.

Service Update

CEQSR

Service Update is a monthly newsletter that tracks developments in the customer services industry. It keeps customer services executives up-to-date with trends in the industry and provides valuable competitive information.

Network Services Reports

Market Reports

Western European Network Services Markets, 1990-1995
(March 1991)

NENSO

This report provides an analysis and forecast for the network services sector of the software and services market. The network services market is segmented into network applications (managed network services, messaging services, EDI and other application services) and electronic information services (on-line databases and news services). The report provides forecasts for industry-specific and cross-industry expenditures and provides profiles and market share analysis of leading vendors.

The Western European Market for Network Services, 1991-1996
(available quarter 4 1991)

NENS1

This report provides an updated analysis and forecast for the network services sector of the European software and services market. The report provides forecasts for industry-specific and cross-industry expenditures as well as market share analysis of leading vendors. The report also identifies trends in the marketplace and assesses their likely impacts on network services vendors.

Topic Reports

Managed Network and Messaging Services, 1990-1995
(January 1991)

NEMSO

This report covers the market for services such as protocol conversion services, X.25 packet assemblers and disassemblers and local-area network services. The report covers all the major European countries and reviews third-party vendors selling messaging services. The report discusses key issues, such as the rapid development of strategic alliances between telecommunications and software and services companies. It also considers the planned deregulation of the EEC telecommunications markets.

The Western European EDI Market, 1990-1995
(March 1991)

NEEDO

This report assesses the market for EDI products and services and can help vendors identify which areas will be in highest demand over the coming years. INPUT's research has shown that EDI is showing very different growth rates across Europe, and the report discusses the implications of this for vendors.

Western European EDI Developments, 1991-1996
(available quarter 4 1991)

NEEDI

This report examines the opportunities available to vendors of electronic data interchange services. It covers all major European countries, profiles leading vendors and identifies the challenges that vendors are likely to face over the next five years, such as the ability to offer an EDI service that handles all classes of network on an end-to-end basis.

Financial Network Services Western Europe, 1990-1995
(January 1991)

NEFNO

The movement towards the deregulation of basis telecommunications carriage will open up a highly competitive market scenario, as banks, service providers and network operators look to increase their market share. This report examines the effect of the proposed deregulation and assesses the opportunities available for vendors. Profiles of leading vendors illustrate the different marketing and service strategies.

**Financial Network Services
Western Europe, 1991-1996**
(available quarter 3 1991)

NEFN1

This report examines the new opportunities that will open up due to the proposed deregulation of telecommunications carriage. The market is becoming more competitive as a result of new players entering the market, so it is even more important for vendors to be knowledgeable. This report provides a complete overview of the current market environment and can make a valuable contribution to strategic planning.

**Opportunities in ISDN and
Other Emerging Technologies in
Western Europe, 1991-1996**
(available quarter 3 1991)

NETO1

Continuing developments of telecommunications technology will open up new service opportunities for network services vendors in an increasingly competitive environment. However, user inertia and the complexities of network use present very real difficulties for both users and vendors in fulfilling the potential these opportunities present. This report explores the dynamics of this situation and provides insight into the most profitable market opportunities and the ways they can be exploited.

User Issues Report

**User Issues in Network Services
Markets—Western Europe
1991-1996**
(available quarter 2 1991)

NEIS1

This report examines the network services market from a user viewpoint. It discusses the issues that concern users and analyses their requirements for network services over the next five years. As networks are playing a more critical role in users' information systems, users' demands and expectations are increasing. It is vital for suppliers of network services to understand the changes that are taking place in the market.

Systems Management Reports (Systems Integration and Systems Operations—Facilities Management)

Systems Integration Reports

Systems Integration Market Forecast—Western Europe, 1990-1995

(March 1991)

SEIMO

This report examines demand and market forces in Europe for systems integration. For each country market, the report estimates the market size, forecasts market growth and identifies the leading vendors. Systems integration is defined as vendor management of a project that provides a complete solution to a complex information system, networking or automation requirement.

Systems Integration Western Europe—Market Analysis and Forecast, 1991-1996

(available quarter 4 1991)

SEIMI

This report updates the market forecast for systems integration in Europe. For each country market, the report estimates the market size, forecasts market growth and identifies the leading vendors. The report provides valuable insight into the current market environment and can assist companies with their strategic planning activities.

Systems Integration Vendor Issues—Western Europe 1990-1995

(March 1991)

SEIVO

This report examines the European systems integration market from the vendor's perspective, identifying and commenting on the major challenges that face systems integration vendors. This report makes recommendations to vendors already active in the market and to those currently outside the market.

Vendor Alliances and Strategies in Western European Systems Integration Markets, 1991-1996

(available quarter 2 1991)

SESVI

This report examines the European systems integration market from the vendor's point of view, identifying and commenting on the major challenges that face systems integration vendors. Bidding for systems integration contracts carries potentially high risk, and the report examines vendor strategies for reducing this risk. It also discusses how vendors are forming alliances to gain the necessary expertise to bid successfully.

Systems Integration User Perspectives—Western Europe 1990-1995

(February 1991)

SEIUO

This report examines the trends that are affecting the systems integration market from the users' point of view. It investigates the major issues in industry markets that are leading users to offer systems integration contracts, and examines user attitudes and concerns when selecting a vendor.

Client Issues in Systems Integration Markets—Western Europe, 1991-1996

(available quarter 3 1991)

SEICI

This report examines the systems integration market from the users' viewpoint to enable companies operating in systems integration markets to better satisfy their clients. The report investigates the major issues in industry markets that are leading users to offer systems operations contracts, and examines user issues and concerns about selecting a vendor.

Imaging Opportunities in Western European Systems Integration Markets, 1991-1996

(available quarter 3 1991)

SEISI

This report examines opportunities in this exciting, emerging technology. Now that pictures, photographs and film can be stored electronically, a plethora of opportunities is arising for integrating such technology into users' information systems. Computerised personnel records can store photographs and banks can store copies of cheques, for example. This report sizes the market for imaging systems and identifies leading vendors in the market, providing valuable competitive information for companies involved in, or considering entering, the market.

Systems Operations Reports

**Systems Operations Market
Forecast—Western Europe
1990-1995**
(December 1990)

SESMO

Systems operations (facilities management) is one of the smallest but fastest growing sectors of the European software and services market. This report examines the demand and market forces in each European country market. Leading vendors are identified and market size and growth rates are forecast. The report also identifies the impact of systems operations on other markets in the software and services industry.

**Systems Operations Western
Europe—Market Analysis and
Forecast, 1991-1996**
(available quarter 4 1991)

SESMI

This report examines the demand and market forces in each European country market. Leading vendors are identified and their market shares are listed. The report also identifies the impact of systems operations on other markets in the software and services industry. The report provides valuable market size data and competitive information for European companies involved in, or considering entering, the systems operations market.

**Systems Operations Vendor
Issues—Western Europe
1990-1995**
(March 1991)

SESVO

This report examines the market trends affecting the systems operations (facilities management) market from the vendors' point of view. It identifies the effects of these trends on services vendors. It also discusses the main issues of bidding for and managing systems operations contracts and identifies the skills that vendors need.

**Vendor Alliances and Strategies
in European Systems Operations
Markets, 1991-1996**
(available quarter 4 1991)

SESVI

This report examines the trends affecting systems operations markets from the vendors' point of view. It discusses the main issues of bidding for and managing systems operations contracts and identifies the vendor skills necessary. This report is valuable to companies already active in the market, and can assist those outside the market in understanding the effect of trends on their own activities.

**Systems Operations User
Perspectives—Western Europe
1990-1995**
(February 1991)

SESUO

This report identifies users' attitudes and assesses their significance to systems operations vendors. The report examines, from the users' point of view, the main issues in contracting the operation of an information system and identifies users' major concerns.

**Client Issues in Western
European Systems Operations
Markets, 1991-1996**
(available quarter 4 1991)

SESC1

This report identifies users' attitudes and assesses their significance for systems operations vendors. The report examines, from the users' point of view, the main issues in contracting the operations of an information system, and analyses these user attitudes. Systems operations vendors can benefit from INPUT's recommendations for vendor marketing strategies.

**Network Management in
Systems Operations Markets
Western Europe, 1991-1996**
(available quarter 2 1991)

SENM1

Computer systems today almost inevitably include some networking facilities. This presents particular niche opportunities for systems operations vendors to manage the network on behalf of the user. This report examines the opportunities available in this market, discusses user requirements for network management and assesses the skills that vendors need to offer in order to enter the market.

Vendor Analysis Programme

The Vendor Analysis Programme consists of a set of company profiles that provide detailed information on over four hundred software and services vendors. Clients receive regular updates and new profiles throughout the subscription period, which are filed in binders. Clients benefit from a valuable, regular source of information on European competitors and potential business partners. The service is enhanced by the hotline service, which clients can use to find out about companies not listed in the profiles.

The Profiles

VEVAP

Clients receive a total of 450 profiles during 1991, of which 300 are updates from the previous year, and 150 are new.

The profiles provide information such as the following:

- Complete contact details (full company name, address, telephone and fax number, name of Chief Executive Officer or other principal contact)
- Company history (when it was founded, merger and acquisition history, subsidiaries)
- Financial data—five-year financial summary when available
- Strategic directions
- Key products and services
- Industry markets served
- Geographic markets served

INPUT

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About INPUT

INPUT provides planning information, analysis, and recommendations for the information technology industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Subscription services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services. INPUT specialises in the software and services industry which includes software products, systems operations, processing services, network services, systems integration, professional services, turnkey systems, and customer services. Particular areas of expertise include CASE analysis, information systems planning, and outsourcing.

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialisation. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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EUROPE

“Undoubtedly operational software support is the largest untapped sector of the software and services market in Europe”

Use this report to find out:

- ✓ the structure of the software support and maintenance market
- ✓ the areas of opportunity available
- ✓ the factors shaping the market
- ✓ implications for vendors
- ✓ market size and forecasts by major European country market

Operational Software Support and Maintenance Opportunities in Western Europe

Large Untapped Market

INPUT's research into the market for maintaining user-written applications software shows that this is the largest untapped sector of the European software and services market.

Report Contents

Defining Software Maintenance
European Software Expenditure
Areas of Opportunity in Operational
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Understanding this sector of the market could provide your company with a lucrative business opportunity for the immediate future.

INPUT's new report, *Operational Software Support and Maintenance Opportunities in Western Europe*, defines and quantifies this market to show the size of the opportunity available. The report also discusses the issues and trends in the marketplace to help you understand how the market is developing and the implications for vendors hoping to enter the market.

The Size of the Opportunity

INPUT's study reveals that on average around 65% of all IS staff activity is devoted to operational software and maintenance, and very little of this is currently outsourced. INPUT's report provides a market forecast for the following countries:

- France
- Germany
- U.K.
- Italy
- Scandinavia

The forecast identifies the size of the existing market for the provision and support of both product and custom software.

The market forecast is split into:

- Systems software products
- Applications software products
- External contractor software
- Operational (in-house) software

The forecasts can help you to define the market and find out the proportion of spend users divert into software maintenance, and how this is split between internal and external sources.

User Attitudes

The results of 200 European user interviews has enabled INPUT to find out which industry sector markets offer the best opportunities for winning software support and maintenance contracts and which country markets are most concerned about software maintenance and support.

INPUT's user research has identified the primary factors that lead companies to use third-party professional services, and the factors that limit the use of such services. This data provides you with valuable insights into why users choose to outsource to third parties and what prevents them from doing so.

INPUT's Research Studies

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*Operational Software Support and Maintenance Opportunities
in Western Europe* at the fee of \$2,850.

Standard delivery includes one copy of all reports issued. Clients may purchase additional copies at \$665 per copy.

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You will be able to better target your sales and marketing activity by highlighting the benefits of outsourcing and responding to the factors that users perceive as negative.

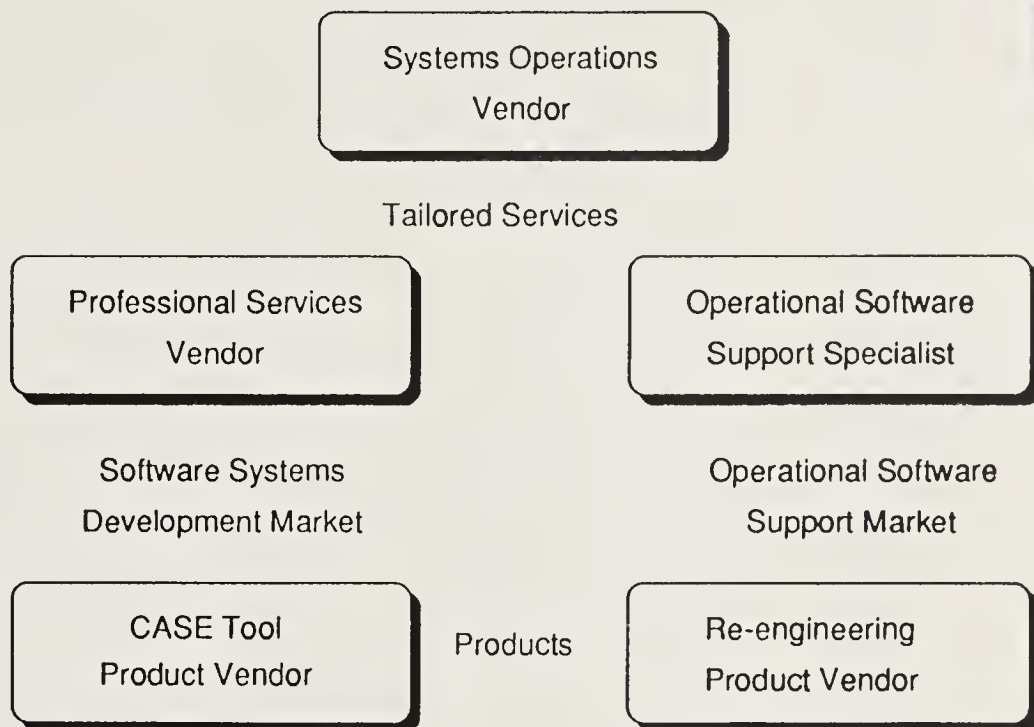
INPUT's report also presents the results of two user case studies, where the operational support is defined and the vendor-proposed solution described, with the resulting benefits to the user. The first case study examines the experience of a government department in contracting out the maintenance and support of an old database application. The second study examines the

experience of a large IS group within a telecommunications PTT that needed to free IS staff with specific business knowledge.

By relating these situations to your own client base, you can use the information to help develop strategies for offering solutions to your clients.

INPUT's report reveals users' perception of software support and maintenance and discusses the issues that concern them. You can use this information to be more responsive to your clients.

Operational Software Support Vendor Strategies



Vendor Success

The number of vendors active in this market remains small, but their success is noteworthy. You can use this report to find out how vendors address this market sector:

- The factors which lead to success in this market
- The five types of service that could make up a portfolio
- Views on profitability

The report discusses how vendors are packaging their service offerings, and how they are adapting their organisational structures to sell these services, for example, by industry sector, or by setting up dedicated teams.

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Gain Insights into Users' Viewpoints on Systems Integration...

Find out:

- The relationship between users and vendors
- The role of user information systems departments
- Reasons for SI project failure
- Vendor selection criteria
- User satisfaction

Systems Integration User Issues— Western Europe, 1990-1995

This new report from INPUT discusses the systems integration market from the users' point of view. It describes the reasons why users outsource their information systems development to an external vendor, and discusses the factors influencing the choice of vendor.

Report Contents

Pressures for Adopting Systems Integration

Role of External Vendors

Vendor Strengths and Weaknesses:

Major Equipment Vendors

Management Consultancies

Professional Services Vendors

User Satisfaction

Case Study—Systems Integration Project

Pricing Issues

Implications for Vendors

Potential Problems with Systems Integration Projects

INPUT's research shows there is a potential problem with the user/vendor relationship during systems integration projects.

Responsibility for project management of the vendor frequently falls between top management and the in-house information systems department. Both of these groups have different strengths and weaknesses in managing the vendor of a large project.

It is vital that the initial system specification is adequately drawn up, and INPUT's report describes some of the pitfalls that have occurred at this crucial stage.

The Buying Process

INPUT's report describes why users outsource the development, or realignment, of information systems and discusses the role and the different requirements of the various departments that are typically involved in the buying cycle. Systems integration vendors can therefore gain valuable information from INPUT's report on the buying cycle of clients.

INPUT's research has shown that the role of the in-house information systems department is changing, and the report discusses the implications of this shift for vendors.

Systems Integration—INPUT's Definition

Systems integration is a business offering that provides a complete solution to an information system, networking, or automation requirement through the custom selection and implementation of a variety of information systems products and services. A systems integrator is responsible for the overall management of a systems integration contract and is the single point of contact and responsibility to the buyer for the delivery of the specified system function, on schedule and at the contracted price.

Competitive Insights

INPUT's report discusses user-perceived strengths and weaknesses of the three vendor types that are active in the systems integration market:

- Management Consultancies
- Major Equipment Vendors
- Professional Services Vendors

User Satisfaction

INPUT's report highlights some of the reasons why users believe systems integration projects fail, and some of the reasons why using an external vendor can be highly satisfactory. The report also compares and contrasts the degree of satisfaction reported by users between large-systems integration projects and smaller professional services projects.

Pricing Issues

INPUT's report can help vendors reconsider the various pricing options in systems integration contracts. Pricing is often problematical and the report discusses the implications of fixed-price and time-and-materials costings.

Factors in Vendor Selection

Nature of Project	Key Factors
Systems Integration	Board-level decision Spin-offs from audits/studies Vendors judged on strategic capabilities Limited evaluation of implementation skills
Professional Services	Experience of vendor Detailed evaluation of capabilities Location

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Network Management as a Systems Operations Outsourcing Opportunity—Western Europe 1991-1996

This report is essential reading if you want to win outsourcing contracts for managing networks. INPUT's report:

- ◆ defines this misunderstood area
- ◆ sizes the market
- ◆ identifies a three-stage outsourcing cycle
- ◆ discusses user and vendor perceptions of networks
- ◆ provides concrete recommendations to vendors hoping to win outsourcing contracts for managing networks

Network Management— A Major Outsourcing Opportunity

The outsourcing of information systems management is greater as user organisations come under increasing cost and resourcing pressures. INPUT has just completed research into a specialised area of outsourcing, network management, to help vendors plan their strategies in this market.

INPUT's new report, *Network Management as a Systems Operations Outsourcing Opportunity—Western Europe, 1991-1996* provides vendors planning to offer a network management service with important information on how best to approach this market. INPUT's research has found that this market is largely misunderstood and hence suffers somewhat from loss of visibility. INPUT's report clarifies the current market position and discusses the opportunities available for vendors, providing important planning information.

INPUT believes that this sector offers major opportunities for outsourcing contracts; the market is expected to increase at a compound annual growth rate of over 25% per annum. However, in order to take advantage of the opportunities, vendors need to understand the scope and definition of network management. INPUT's report clarifies where the opportunities lie and defines the scope of the network management market so that vendors can make the most of it.

Networks are becoming increasingly important components of user's information systems, which are key to the user's business. As users are becoming more open to the concept of outsourcing the operation of their information systems, factors such as lack of in-house resources and increasing network complexity are influencing the decision to outsource the management of the network. INPUT's report discusses this and other trends affecting the network management market.

Network management contracts can cover the management of the user's network only, or they can be part of a contract covering the rest of the user's information systems centre, which includes the network. INPUT's report sizes the market for both of these opportunities.

Users and Vendors Differ in Defining Networks

INPUT's research has shown that users tend to view a network as including any component of the network. Vendors, however, take a narrower, product-based view, which could become an inhibiting factor in deciding the scope of network management contracts. Being aware of potential problems such as this can help you avoid some of the pitfalls.

Report Contents
Market Definition
<ul style="list-style-type: none"> • Systems Operations Market Sector • Outsourcing • The World Market • The European Market • Positioning Parameters • Market Positioning—User Viewpoint • User Perspectives on Systems Operations • System Aspects • Market Positioning—Outsourcing • Vendor Activity • Outsourcing Market Analysis • European Analysis and Forecast • Market Evolution
Market Analysis and Forecast
<ul style="list-style-type: none"> • Outsourcing • Market Size
Vendor and User Considerations
<ul style="list-style-type: none"> • Importance of Network Management • Contract Revenues • Trends • Vendors Perceive Strategic Benefits • Reasons for Contracting • Market Leadership Opportunity
Managing User Networks
<ul style="list-style-type: none"> • Network Management Described • Network Management Functions • Organisation of Network Management • Network Management Issues
Conclusions and Recommendations

Options for Network Management

INPUT's report discusses the opportunities available for vendors in network management, which range from:

- Providing strategic feasibility studies to ascertain how far the network is meeting the requirements for the overall business direction
- Network implementation where networks are upgraded or new networks installed
- Providing management once the network is operational

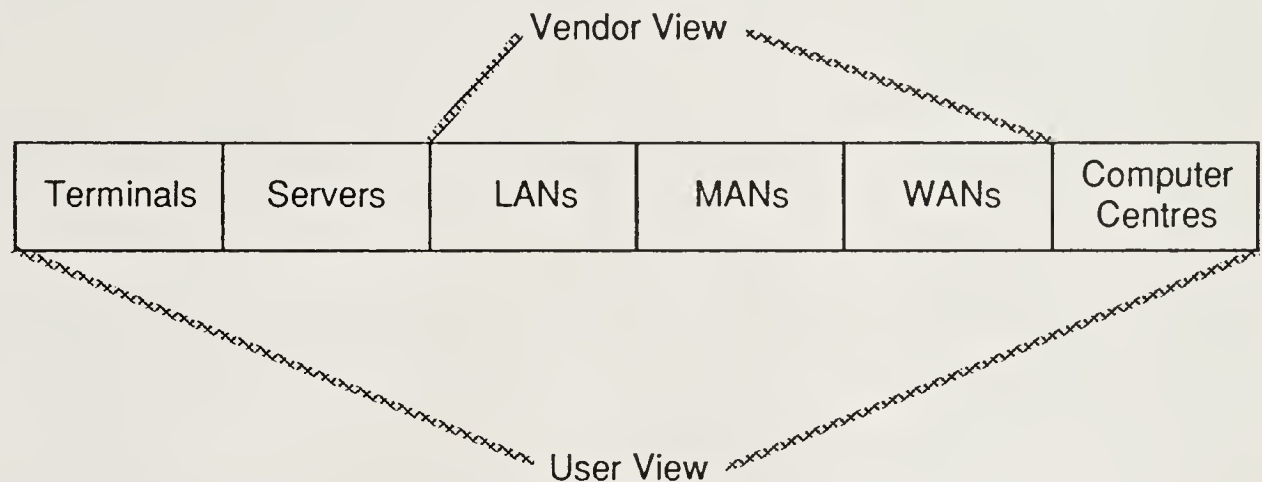
INPUT's report discusses these opportunities and the factors upon which they depend, so that you can better target your sales and marketing activities.

Competitive Positioning

Vendors in the network management market may find that they are competing against different types of companies offering different solutions. It is essential to be able to evaluate your company's position vis-à-vis your competitors and to understand the range of solutions being sold in the marketplace. INPUT's report discusses the potential contributions that various types of vendor can make to the network management market:

- PTTs
- Specialist carriers—for example, mobile radio, radiopaging and satellite broadcasting operators
- Independent network service providers
- IT equipment and telecommunications vendors
- Major professional services companies

Networks—A Wider View



- Internal view-user
 - Terminal end-user viewpoint on system
 - Servers, comp—OS networks—MIS concern
- External view—vendor tendency
 - Must widen his view to be aware of all facets of NM market

It is vital that vendors be able to match solutions to users' requirements at a detailed level, and INPUT's report provides guidelines to help vendors ensure that the major issues are addressed.

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Find Out Why Users Adopt Systems Operations

And:

- How the systems operations market is segmented
 - Vendor selection criteria of purchasers for each market segment
 - Perceived suitability of equipment vendors, management consultancies, and professional services vendors to serve each market segment
 - Levels of user satisfaction and the main causes of user dissatisfaction
- 
- A solid blue horizontal bar spanning the width of the page at the bottom.

Find Out in INPUT's New Report Systems Operations User Issues— Western Europe, 1990-1995

Systems operations, or facilities management, involves the operation and management of all or a significant part of the user's information systems functions under a long-term contract.

INPUT's report can assist vendors of systems operations services, or vendors wishing to enter the market, in understanding users' reasons for adopting system operations and what factors influence their selections of vendors.

Systems Operation Market Segmentation

INPUT has identified three market segments for systems operations, each displaying its own unique combination of reasons for purchase and vendor selection criteria.

The market segments are:

Operations Management

The user outsources the operation of the computer equipment, but retains full control of applications maintenance and development. The equipment, most commonly mainframe-based, is typically transferred to the vendor's site.

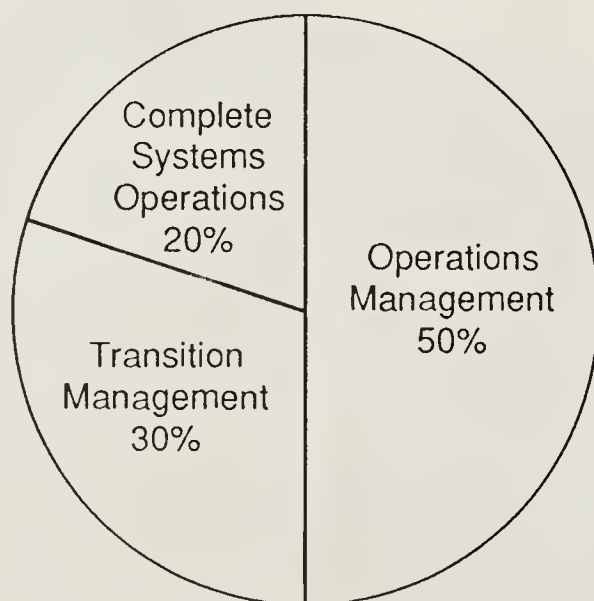
Transition Management

The vendor manages the user's existing system while new systems are developed.

Complete Systems Operations

The user outsources both the management of existing information systems and the development of new ones to the same vendor.

Western European Systems Operations Types of Service



Sample of 12 European systems operations users
INPUT estimate

For each of these segments, INPUT's report provides:

- Vendor selection criteria
- Vendor positioning—which vendors are best suited to each segment
- Switching criteria—what factors prompt users to consider a change of vendor
- User likes and dislikes about their vendors
- INPUT's estimate of the percentage of users adopting each type of service

Vendors can use INPUT's report to help them identify their competitive positions. Vendors can also find out users' opinions about systems operations and the resulting implications. The report can help vendors better satisfy their current users and better target new prospects.

Find Out the Pressures that Lead to Systems Operations Contracts

Pressures such as decentralisation are driving the systems operations market in Europe—for example, the U.K. health authorities are moving from centralised regional systems to local systems in line with government policy to devolve responsibility to hospital and district level.

Report Contents

The Buying Process

Pressures for Adopting Systems Operations
Types of Systems Operations Service
Market Segmentation
Operations Management
Transition Management
Complete Systems Operations
Public Sector Issues

Purchasing Criteria
Overall Criteria
Operations Management & Transition Management
Complete Systems Operations

Perceived Suitability of Vendors
Overall Suitability of Vendor Types
Perceptions of Management Consultancies
Perceptions of Major Equipment Vendors

User Satisfaction
Overall Level of Satisfaction
Causes of Satisfaction
Causes of Dissatisfaction
Switching Criteria
Inhibitors to Systems Operations

Implications for Vendors

Operations Management
Transition Management
Complete Systems Operations

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In the private sector, too, many organisations are decentralising in an effort to make each subsidiary more accountable for its core business. Such decentralisation is frequently accompanied by a major realignment of information systems and a downsizing of equipment used.

INPUT's report discusses this and other factors that are driving the systems operations market. Interestingly, decentralisation can also be viewed as a market inhibitor. The report lists the six major reasons why users adopt systems operations, and also the reasons that are unique to each of INPUT's three market segments.

What Are the Implications for Vendors?

The report relates its user research to vendors and assesses the likely direction that the market will take. Systems operations is still not readily accepted by the majority of user bases, and the number of prospects available to vendors is limited. INPUT's report can help you make the best of the opportunities available.

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Find Out the Latest Developments in European EDI Markets

A list of six bullet points is contained within a light purple trapezoidal shape that tapers to the right.

INPUT's report provides:

- * A unique analytical market assessment tool
- * Market size, forecasts and growth rates
- * Industry sector penetration
- * Discussion of market issues
- * Recommendations for vendors and users of EDI

Variable Market Size and Growth

Variable EDI market size and growth in Europe means that vendors of EDI products and services need intelligence data in order to accurately target their sales and marketing efforts.

INPUT's report, *The Western European EDI Market*, provides the information that vendors need in order to make strategic marketing decisions.

This dynamic, high-growth market offers exciting opportunities to those vendors who are best able to target their products and services to the different requirements of various countries and industry sectors. You will be able to use INPUT's report to find out which markets are growing the fastest and to learn about the regulatory and driving and inhibiting forces affecting the EDI market.

INPUT's report examining the impact of EDI on the European software and services industry is essential reading. It provides, in a single volume,

an accurate assessment of the climate in the major European country markets, so that you can find out which countries offer the best openings for your products and services.

Use INPUT's Unique Analytical Tool

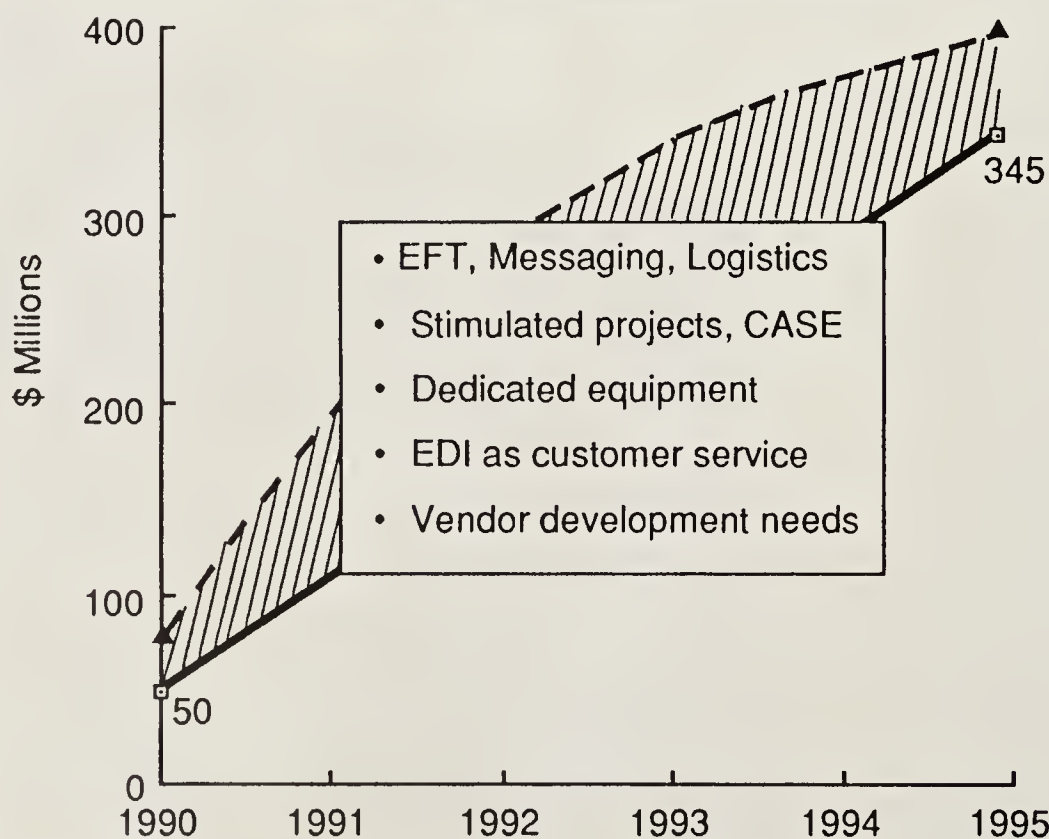
The report contains the EDI INPUT-OUTPUT Matrix to assist vendors in assessing their competitive positioning. It sets out, in a easy-to-read, matrix format, details of who communicates with whom in various industries and indicates the levels of requirement for EDI products and services. It also lists major EDI projects. Vendors can use this tool to see how their company's products and services can best meet the needs of their customers.

European Market Coverage

INPUT's report covers the following country markets:

U.K.
France
Germany
Italy
Scandinavia
Benelux
Spain
Rest of Europe

European EDI-Associated Sectors



One of the major strengths of INPUT's research is its European coverage, enabling you to compare activities in the various country markets and identify emerging trends. Europe-wide knowledge is particularly important for vendors of EDI products and services, as there is an ever-increasing need for communication across European countries.

INPUT's Research Studies

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Report Contents

EDI and Related Application Areas

- Reasons for using EDI
- Approaches to EDI networking
- EDI software solutions
- Relationships between EDI and other application areas
 - EDI and electronic mail
 - EDI and on-line order entry systems
 - EDI and electronic funds transfer
 - EDI and logistics
 - Other forms of EDI
 - EDI, data bases and internal applications
 - EDI and manufacturing

Market Analysis and Forecast

Market Environment

- Network environment
- Critical mass
- Standards
- Cost benefits
- National versus international
- Industry associations
- Issues:
 - Security
 - Legal
 - Management Issues
 - Pricing Trends
 - Interworking
- Competitive environment
- Network services software
- Professional services
- Partnering
- The role of banks

Country Market Analysis

- | | |
|-----------|------------------|
| • U.K. | • Scandinavia |
| • France | • Benelux |
| • Germany | • Spain |
| • Italy | • Rest of Europe |

EDI in the 1990s

Vendor recommendations

User recommendations

EDI and Its Relationship with Other Software and Services Markets

The report provides discussion of the relationship between EDI and other software and services sectors, such as on-line order entry systems and electronic mail. Once the implementation of EDI widens, its effects on the rest of the software and services industry will be significant. Major development initiatives are discussed, such as EDIFACT and X.400 standards, as well as issues, such as security and pricing trends.

EDI and the Future

The report concludes with an assessment of the status of EDI in 1990 and a forecast of its likely development during the 1990s. The report provides recommendations to vendors of EDI products and services to help increase their market penetration. The report also advises factors to take into consideration when planning to implement EDI.

INPUT's EDI report can make a valuable contribution to your market planning.

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Systems Software Support Issues in Customer Services Western Europe 1991-1996

*Improve your systems
software support service*

Users of this report can:

- ✓ Learn about user trends in customer satisfaction with system software support, based on four years of trend data from over 5,000 interviews
- ✓ Find out users' specific concerns with systems software support based on the results of 30 in-depth interviews
- ✓ Use INPUT's recommendations to address the issues successfully

INPUT's User Satisfaction Surveys

INPUT has been researching user satisfaction with the customer services market for over five years. As part of this research, users are asked questions about their satisfaction with systems software support.

INPUT's new report, *Systems Software Support in Customer Services Western Europe, 1991-1996* analyses the reasons users are dissatisfied with systems software support and suggests strategies for service organisations to overcome the difficulties.

This report, based on four years of trend data, is essential reading for companies offering systems support services because knowing where the problems lie is the first step towards improving performance. INPUT's report reveals particular areas of user-perceived weakness, so service organisations can address them successfully.

Growth Forecasts for the Systems Software Support Market, 1991-1996

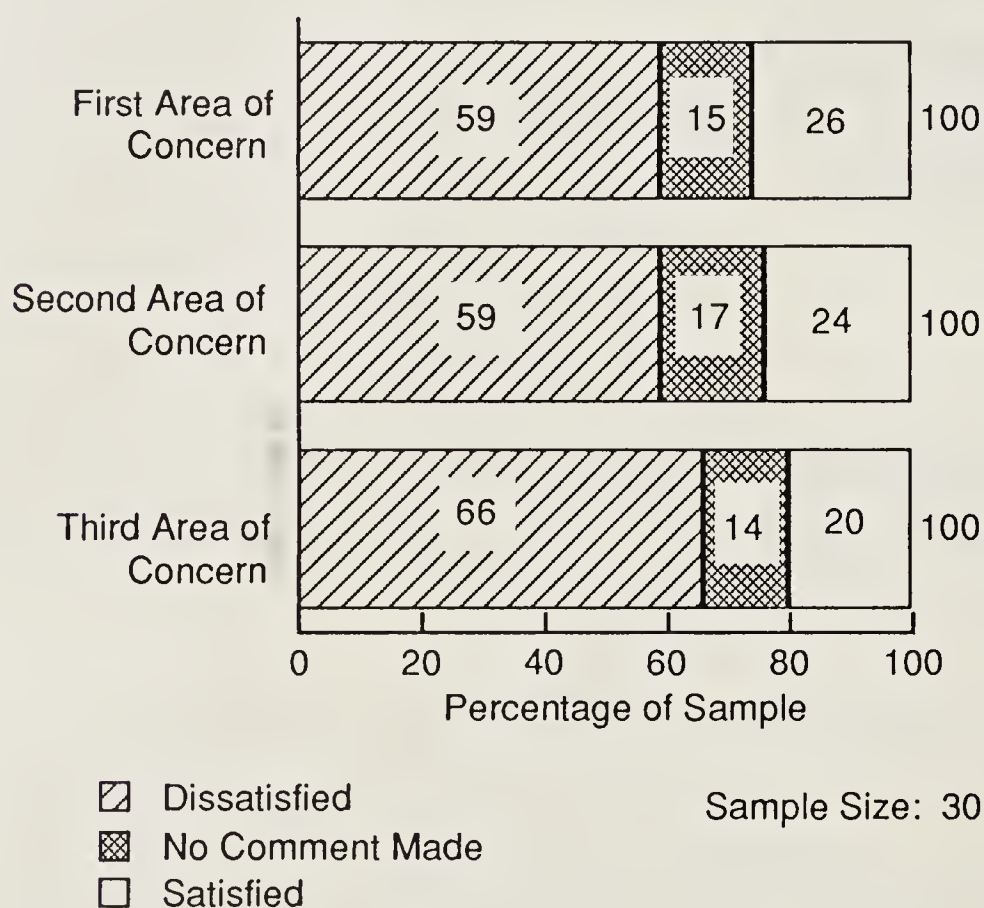
INPUT's report forecasts the growth of this market over the five-year forecast period 1991-1996 and evaluates the competitive scenario. As more industry standard software is adopted, opportunities are created for professional services vendors to enter the market and increase competition. It is therefore vital for service departments of equipment vendors to respond to the needs of their customers if they wish to retain them. INPUT's report provides valuable assistance

for service vendors to re-evaluate the support they offer.

Trends in Customer Satisfaction with Systems Software Support

The report presents overall trends in customer attitudes over the four-year period 1987-1990, based on over 5,000 interviews. INPUT uses a satisfaction index to measure user satisfaction.

Systems Software Support Areas of Dissatisfaction



Over the last four years, INPUT's research has shown that satisfaction with systems software support has been declining. Users are now expressing real concerns and worries over the quality of support they receive.

INPUT's Research Studies

Yes!

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*Systems Software Support Issues in Customer Services—
Western Europe, 1991-1996* report at the fee of \$2,850 each.

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This is calculated by asking users to rate, on a scale of 1-10, how important systems software support is and then how satisfied they are with the support they receive. The difference between these two numbers provides a satisfaction index. For example, if a user gives an importance rating of 8 for systems software support, but a rating of 5 for satisfaction, the satisfaction index of 3 indicates that the vendor is not meeting the customer's requirements. The satisfaction index is useful in quantifying customer satisfaction.

In this report, INPUT presents comparative trend data for 10 of the leading equipment vendors, providing valuable competitive positioning information.

Find Out What the Areas of Concern Are

INPUT's report highlights three main areas of concern in user satisfaction with systems software support, as indicated in the research. For each of these areas, the report draws upon the results of 30 in-depth interviews where the issues are discussed at length.

Find out:

- Precisely what is causing user dissatisfaction
- The implications for vendors
- How to rectify the problems

Should Systems Software Support be Bundled or Unbundled?

INPUT's research has shown that no clear directions have been established with regard to this important strategic issue. INPUT's report analyses the factors influencing the decision of whether to bundle or unbundle software support and attempts to forecast the likely route that vendors will take over the next five years.

Report Contents

Market Analysis

- Product Market Analysis
- Market Forecast

Bundling Issues

- Comparative Complexity—Hardware and Software
- The Customers' Preference

Skills Issues

- Trend Analysis
- Software Skills
- Quality of Service
- Tactical Improvements

Documentation Issues

- Trend Analysis
- Quantity and Comprehensiveness
- Quality of Service
- CD-ROM

Software Updates

- Trend Analysis
- Issues
- Tactical Improvements

Conclusions

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Western European Customer Services Market Analysis and Forecast 1990-1995

Use this report to find out:

- ◆ Market sizes and growth rates for customer services split by:
 - Country
 - Leading equipment vendor
 - Major service sector
- ◆ INPUT's view of how the market will develop over the next five years
- ◆ Penetration of the customer service market by independent vendors
- ◆ Competitive issues

Find Out User Expenditures in Customer Services

INPUT's latest report on the customer services market is invaluable to customer services executives in planning their strategies over the next five years. The report gives estimates of the market sizes and growth rates over the forecast period and splits the spend across four service sectors, so that you can see exactly where the best opportunities lie. These sectors are:

- Hardware Service
- Systems Software Support
- Professional Services
- Education and Training

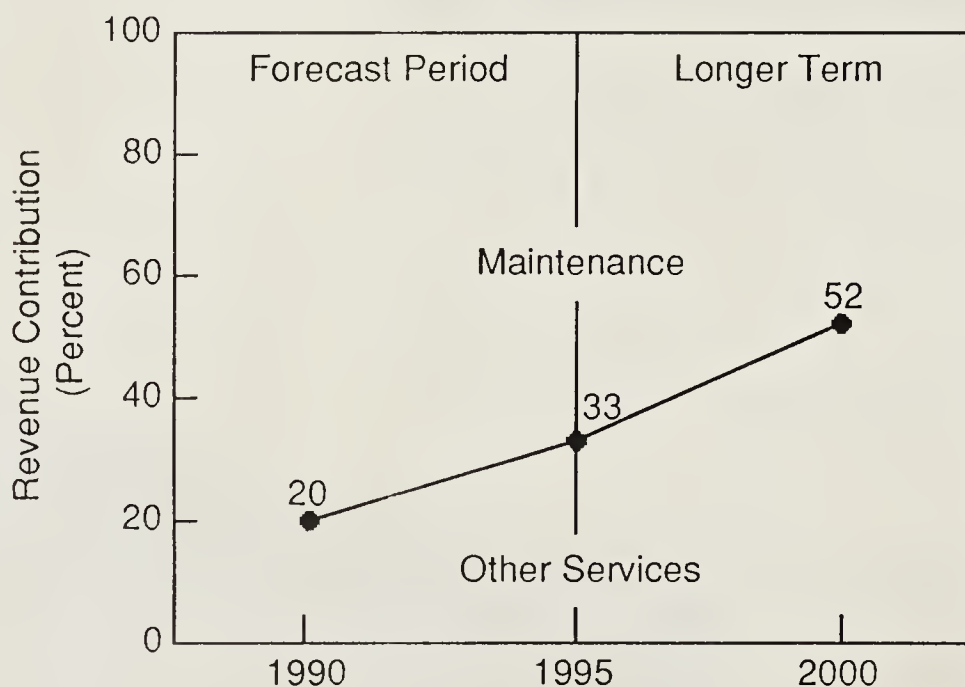
Market shares for three vendor types are also listed:

- Equipment Vendors
- Independent Maintenance Vendors
- Dealers and Distributors

Long-Term Trends

You can find out how the market is likely to evolve over the forecast period and beyond, and learn what the long-term growth prospects are—vital market planning information.

Customer Services—Changing Emphasis



The report addresses questions such as:

- Will independent vendors continue to increase market penetration?
- Will hardware maintenance revenues continue to decline?
- Are professional services still offering the opportunities to recover from lower hardware maintenance revenues?
- Does professional services present a key opportunity?

The answers to these questions will be found in INPUT's report, *Western European Customer Services Market Analysis and Forecast, 1990-1995*. The report provides customer services executives with the information they need to plan their businesses realistically to ensure success.

Competitive Insights

INPUT's report lists the revenues and market shares of the leading 15 equipment vendors. These vendors account for nearly 80% of total user expenditures, so this data gives you accurate competitive insights.

Country Market Details

The report gives market growth for 13 countries, enabling you to develop particular plans for individual country markets.

Austria
Belgium
Denmark
France
Finland
Germany
Italy

The Netherlands
Norway
Spain
Sweden
Switzerland
U.K.
Rest of Europe

Customer services executives can benefit from INPUT's data which is presented in many ways. Expenditure in each country market are listed by **service sector** (hardware service, systems software support, professional services, and education and training) and by **equipment vendor**. In addition, each of the leading 15 equipment vendors' revenues are presented by **country**.

Report Contents

- Market Definition
 - Market Growth, 1990-1995
 - Service Sector Growth, 1990-1995
 - Market Growth by Vendor Type
 - Country Market Growth
 - Leading Equipment Vendor Customer Services Revenues
 - Long-Term Trends
-
- Market Definitions
 - Service Vendor
 - Service Sector
-
- Customer Services Revenue Stream by Product Type

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VAR Markets and Support Issues in Western European Customer Services 1991

INPUT's new report provides equipment vendors with important information on the issues and trends in the indirect sales channel market:

- ◆ Partnership selection criteria
- ◆ Market drivers and inhibitors
- ◆ Vendor risks and responsibilities in using indirect channels
- ◆ Service trends for equipment sold via indirect channels
- ◆ Market size and growth rates

Channel Control

Selling equipment by indirect channels can create opportunities for equipment vendors to reach wider markets or specialised niche markets. However, if this route is to be successful, vendors need to keep firm management control of their partners.

INPUT's new report—*VAR Markets and Support Issues in Western European Customer Services, 1991*—discusses the issues involved in managing indirect channels to help equipment vendors plan their strategies in setting up the agreements.

The report discusses both value-added resellers (VARs) and dealers and distributors, and identifies the potential risks that vendors take on when setting up indirect sales channels. The choice of partner is critical to the success of the venture, and so the report gives guidelines on what vendors should take into consideration when evaluating potential partners.

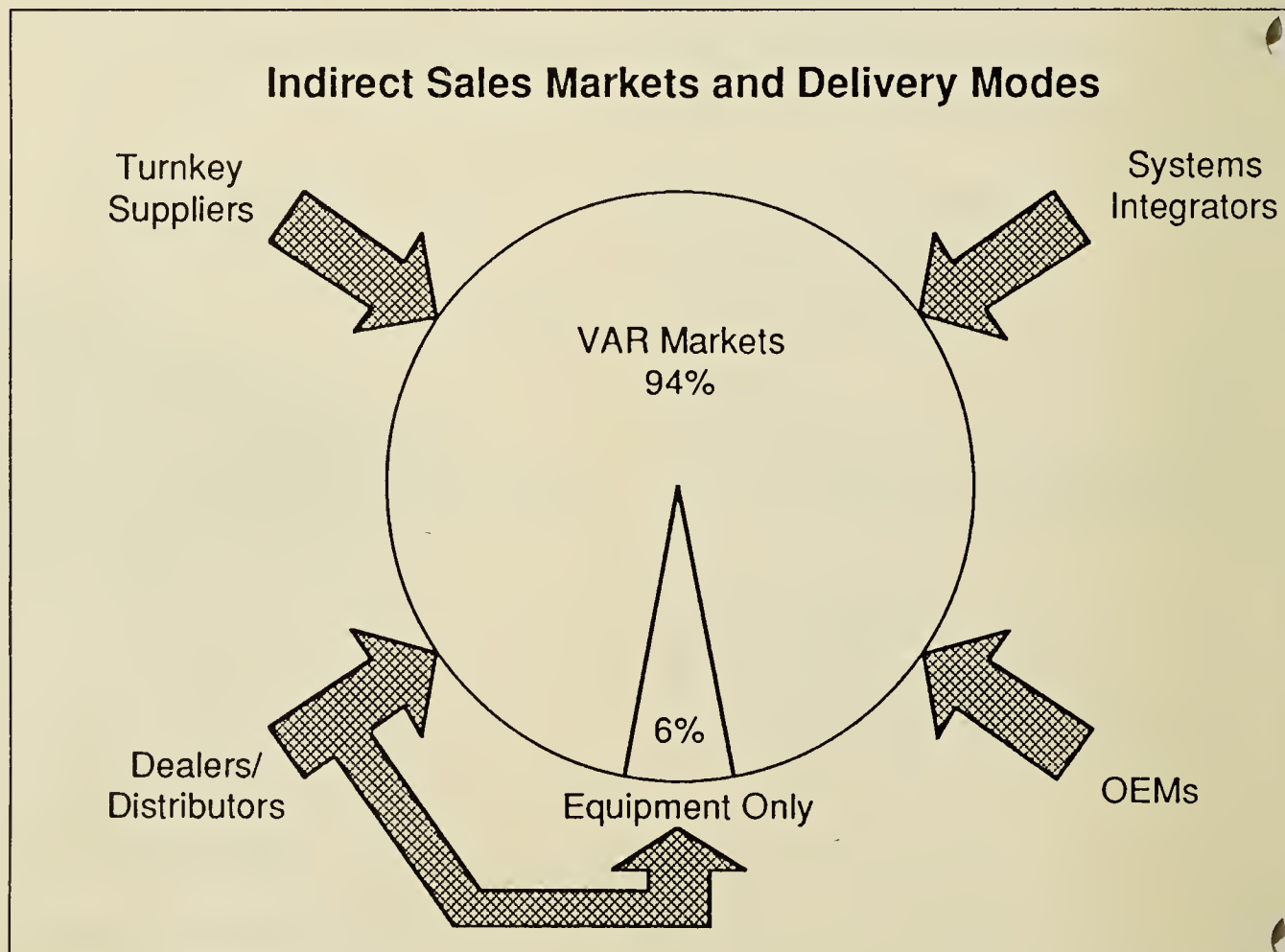
The report also discusses the potential problems that can arise with second- and third-level distributors, where there is a danger of even further distance between the equipment manufacturer and the user.

Channel Delivery Modes

The report identifies four major delivery modes for indirect equipment and software sales:

- Systems integrators
- Turnkey systems suppliers
- OEMs
- Dealers and distributors

INPUT's report discusses the offerings and market shares of each of these groups, providing you with a competitive picture of how the market is structured.



INPUT's Research Studies

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Please enter my order as described: *VAR Markets and Support Issues in Western European Customer Services, 1991* report at the fee of \$2,850 each.

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Find out the Driving and Inhibiting Forces in the Market

INPUT believes that there is potential danger in the original equipment vendor becoming isolated from the needs of its users, and also of the users becoming distanced from the expertise of the original manufacturers. The report discusses these issues and also the main driving and inhibiting forces in the market—important information for successfully managing your indirect sales channels. For example, one of the market drivers is the growing trend toward outsourcing information systems development in an attempt to reduce overhead and focus on the primary business activity. INPUT's report discusses the implications of this trend for equipment vendors, providing important insights into this market.

This market is complex, and the segmentation boundaries are somewhat blurred. INPUT's report can provide equipment vendors with the information they need in order to plan their strategies in this market.

Market Share Information

INPUT's report examines the market for specialised packaged solutions and the market for indirect sales of computer equipment. It also provides market share figures for different types of vendors and estimates the percentage of equipment that is sold via indirect channels, and the percentage of indirect sales that come from dealers and distributors.

The report also estimates the revenue contributions that various equipment manufacturers derive from indirect sales channels.

Servicing Trends

Indirect sales partners are encouraged to provide service from the original vendor, and INPUT's report discusses the reasons for this trend and its implications for vendors and users. The report also reveals the most usual conditions that equipment vendors impose on VARs that perform their own servicing.

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Report Contents

Channel Delivery Modes and Support Requirements

- Marketing Channels
- Third-Party Delivery Modes
- Dealer/Distributor Channels
- Equipment Vendor Dealer/Distributor Considerations
- Support of Third-Party Channels

Channel Opportunities and Trends

- Importance of Indirect Sales
- Benefits and Risks
- Training and Support
- Vendor Preferences
- Warranty Trends

Specialised Packaged Computing Solutions

- Market Structure
- Turnkey Systems Market Growth, 1991-1996
- Systems Integration Market Growth, 1991-1996

VAR Packaged Solution Markets

- Indirect Sales Channel Markets
- Market Drivers and Inhibitors
- VAR Channels and VAR Market Share
- Impact of UNIX
- Customer Services Revenues in VAR Markets, 1991

Tactical Approaches to Channel Markets and Support

- Dell
- Digital
- Sun
- Unisys
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User Satisfaction with Vendor Customer Services Trends and Issues in Western Europe, 1990

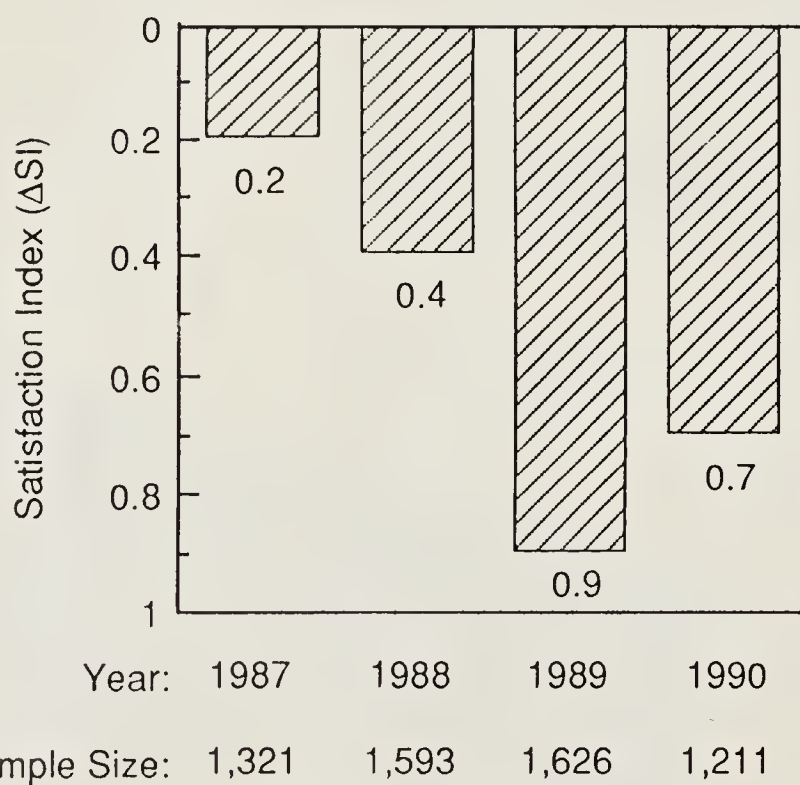
This report helps you understand users' views on the service your company and your competitors are providing.

- ◆ Compare this year's results with last year's
- ◆ Find out the areas of concern
- ◆ Learn which country markets are most vulnerable to user dissatisfaction

User Satisfaction with Customer Service

This report from INPUT presents a review of user satisfaction with customer service in Western Europe in 1990. It analyses the results of interviews conducted with computer users aimed at identifying key user issues relating to the perceived level of service provided by vendors. The data is based on over 1,200 interviews relating to some 150 aspects of service and support. In addition, INPUT conducted 30 in-depth interviews that revealed the key user issues covered in this report.

**Western Europe
Hardware Service Satisfaction Trends**



INPUT's analysis of these results—based on solid research—gives vendors the opportunity to better satisfy their users.

INPUT's report provides user satisfaction data for:

- Hardware Service
- Systems Software Support
- Systems Availability
- System Failure Rates
- Hardware Service Response and Repair Times
- Systems Software Support Response and Fix Times

You will also find out the differences in satisfaction among system sizes:

- Large Systems
- Medium Systems
- PCs and Workstations

INPUT's report, *User Satisfaction with Vendor Customer Services—Trends & Issues in Western Europe, 1990*, covers all the major issues in service across the three system sizes, giving you the total picture on which to base your planning. You will be able to identify specific problem areas, and thereby improve your service and your customers' satisfaction.

INPUT's Research Studies

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INPUT's Satisfaction Index

INPUT's satisfaction index provides you with a valuable way of measuring levels of satisfaction with various aspects of service. It is calculated by asking the user to rate on a scale of 0 -10 how **important** each service aspect is, and then how **satisfied** the user is with the vendor's performance. The difference between these two ratings provides the satisfaction index. The smaller the difference, the more satisfied the user.

Country Markets Covered

Belgium	Norway
France	Spain
Germany	Sweden
Italy	U.K.
The Netherlands	

The European coverage in the report means that you can identify specific differences between countries and therefore better target your efforts.

In-Depth Interviews

INPUT's in-depth interviews give greater insight into users' views about the service they are receiving. Only 53% of the sample expressed a level of satisfaction with hardware service without voicing some concern. INPUT's report reveals these concerns. The interviews provide:

- Comments from the users interviewed
- User views of vendors' strengths and weaknesses
- Quality of service ratings from users

The results of the interviews provide you with important feedback from your users.

Trend Data

INPUT's report presents trend data in a graphical form which allows comparisons to be made with previous years. Data is presented by system size and by vendor. There are also service performance comparisons by vendor.

You can therefore build an historical picture of your company's service performance against others—important competitive information.

Report Contents

Major Issues and Trends
Service Trends
Hardware Service Satisfaction
Systems Software Support
Systems Availability
System Failure Rates
Hardware Service Response/Repair Times
Systems Software Response/Fix Times

Vendor Quality Image Ratings

Key Issues with Customer Service
Hardware Service
Systems Software Support
Strengths and Weaknesses of Vendor Service
Quality of Service
Other Services

Trends, 1988-1990
Hardware Service
Systems Software Support
Systems Failure Rates
Response and Repair/Fix Times

Key Service Trends
Large Systems
Medium Systems
Small Systems

Service Performance Comparisons
Vendor Comparisons
Key Country Market Comparisons

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The Marketing Challenges of the 1990s

In today's fast moving and competitive software and services industry, it is becoming increasingly difficult to keep up-to-date with the latest issues and trends in the marketplace and to keep abreast of developments from the competition. Executives and managers are under increasing pressure to gain insight into the markets, track user trends, collect market size data and position their company against the competition.

INPUT can help meet these challenges with its planning and advisory services.

Clients

INPUT's clients are executives and managers with responsibility for marketing, strategic planning and business development within the computer software and services industry.

They include more than 100 of the world's largest and most technically advanced companies including Digital, IBM, Unisys, ICL, BULL, Olivetti, SD-Scicon, Cap Gemini Sogeti, the Sema Group, Sligos and Finsiel.

Many clients have taken advantage of INPUT's services on a continuous basis for many years, some since 1974 when INPUT was founded. Clients include vendors of professional services, systems integration, software products, processing services, turnkey systems, communications systems and equipment and software maintenance and support.

INPUT

INPUT is an international market research consultancy specialising in tracking developments in the computer software and services industry. INPUT's continuous research and consultancy services enable managers to make informed business and marketing decisions.

On a regular basis throughout the subscription period, clients are provided with the information that they need about their markets:

- ◆ market size data and forecasts
- ◆ user trends
- ◆ analysis of market issues
- ◆ strategic assessment of market potential
- ◆ competitive tracking and analysis
- ◆ recommendations

An annual subscription to INPUT's services means that regular advice and reliable information can help you plan for a more profitable business.

Expertise

INPUT's clients benefit from the expertise of its professional staff, many of whom have over twenty years of computer industry experience and are specialists in their fields. These include telecommunications, software products, customer service, information systems, marketing and planning. INPUT specialises in market and competitive analysis, research into user needs and satisfaction levels and market issues and trends.

INPUT's Services

INPUT's continuous advisory services comprise a number of elements to provide clients with up-to-date strategic information.

A series of reports examine issues and trends and present forecast data. To alert clients to key research findings and trends, research bulletins are released before the report is published.

Consultants are available for informal discussions or special presentations to enable clients to obtain an independent view on a particular issue. A hotline enquiry service and a library of up-to-date vendor files add an extra dimension to a client's own marketing department.

Some of INPUT's research programmes include a regular newsletter to bring clients topical news on various aspects of the industry.

INPUT holds regular client meetings to enable exchange of ideas. The meetings provide an ideal forum to meet other managers in the industry as well as INPUT consultants.

INPUT also conducts multiclient studies, carries out confidential studies to meet special research needs and can advise on merger and acquisition strategy and assist in its implementation.

INPUT's Programmes

Customer Services

Market and Vendor Analysis (Software and Services)

Systems Integration

Network Services

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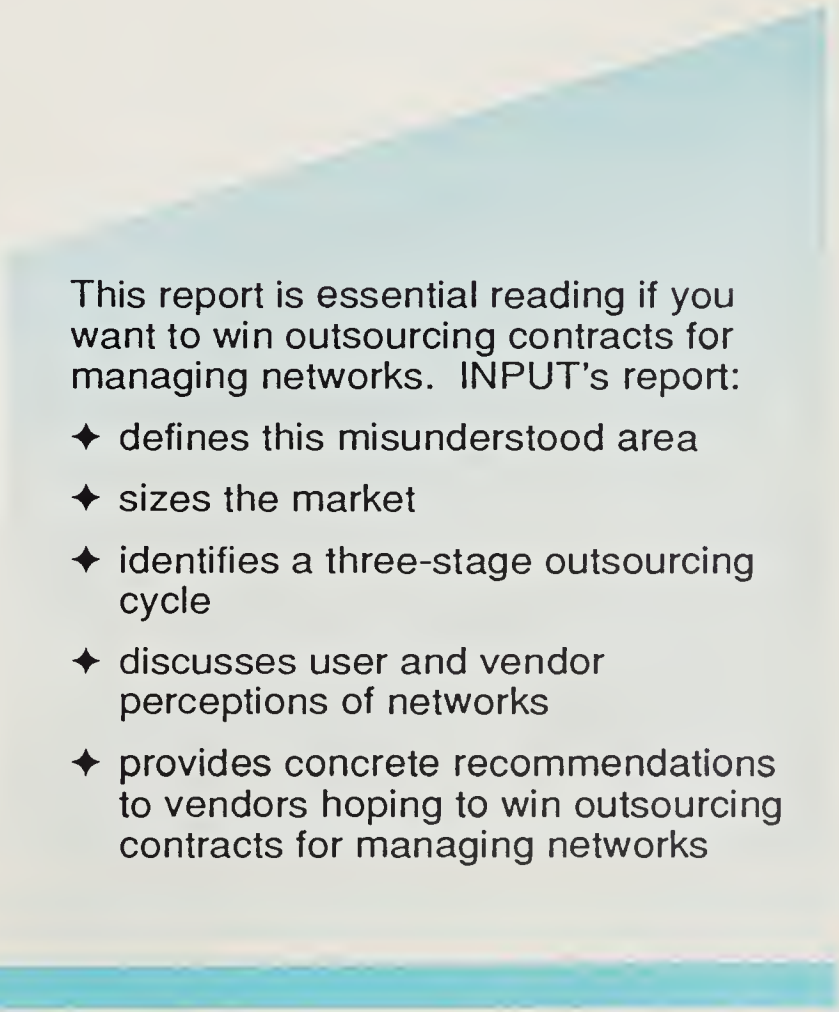
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The logo for INPUT is a light blue parallelogram with the word "INPUT" in white, uppercase, sans-serif font.

INPUT

Network Management as a Systems Operations Outsourcing Opportunity—Western Europe 1991-1996

A light blue parallelogram containing text and a bulleted list.

This report is essential reading if you want to win outsourcing contracts for managing networks. INPUT's report:

- ◆ defines this misunderstood area
- ◆ sizes the market
- ◆ identifies a three-stage outsourcing cycle
- ◆ discusses user and vendor perceptions of networks
- ◆ provides concrete recommendations to vendors hoping to win outsourcing contracts for managing networks

Network Management— A Major Outsourcing Opportunity

191

The outsourcing of information systems management is greater as user organisations come under increasing cost and resourcing pressures. INPUT has just completed research into a specialised area of outsourcing, network management, to help vendors plan their strategies in this market.

INPUT's new report, *Network Management as a Systems Operations Outsourcing Opportunity—Western Europe, 1991-1996* provides vendors planning to offer a network management service with important information on how best to approach this market. INPUT's research has found that this market is largely misunderstood and hence suffers somewhat from loss of visibility. INPUT's report clarifies the current market position and discusses the opportunities available for vendors, providing important planning information.

INPUT believes that this sector offers major opportunities for outsourcing contracts; the market is expected to increase at a compound annual growth rate of over 25% per annum. However, in order to take advantage of the opportunities, vendors need to understand the scope and definition of network management. INPUT's report clarifies where the opportunities lie and defines the scope of the network management market so that vendors can make the most of it.

Networks are becoming increasingly important components of user's information systems, which are key to the user's business. As users are becoming more open to the concept of outsourcing the operation of their information systems, factors such as lack of in-house resources and increasing network complexity are influencing the decision to outsource the management of the network. INPUT's report discusses this and other trends affecting the network management market.

Network management contracts can cover the management of the user's network only, or they can be part of a contract covering the rest of the user's information systems centre, which includes the network. INPUT's report sizes the market for both of these opportunities.

Users and Vendors Differ in Defining Networks

INPUT's research has shown that users tend to view a network as including any component of the network. Vendors, however, take a narrower, product-based view, which could become an inhibiting factor in deciding the scope of network management contracts. Being aware of potential problems such as this can help you avoid some of the pitfalls.

Report Contents
Market Definition
<ul style="list-style-type: none"> • Systems Operations Market Sector • Outsourcing • The World Market • The European Market • Positioning Parameters • Market Positioning—User Viewpoint • User Perspectives on Systems Operations • System Aspects • Market Positioning—Outsourcing • Vendor Activity • Outsourcing Market Analysis • European Analysis and Forecast • Market Evolution
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<ul style="list-style-type: none"> • Outsourcing • Market Size
Vendor and User Considerations
<ul style="list-style-type: none"> • Importance of Network Management • Contract Revenues • Trends • Vendors Perceive Strategic Benefits • Reasons for Contracting • Market Leadership Opportunity
Managing User Networks
<ul style="list-style-type: none"> • Network Management Described • Network Management Functions • Organisation of Network Management • Network Management Issues
Conclusions and Recommendations

Options for Network Management

INPUT's report discusses the opportunities available for vendors in network management, which range from:

- Providing strategic feasibility studies to ascertain how far the network is meeting the requirements for the overall business direction
- Network implementation where networks are upgraded or new networks installed
- Providing management once the network is operational

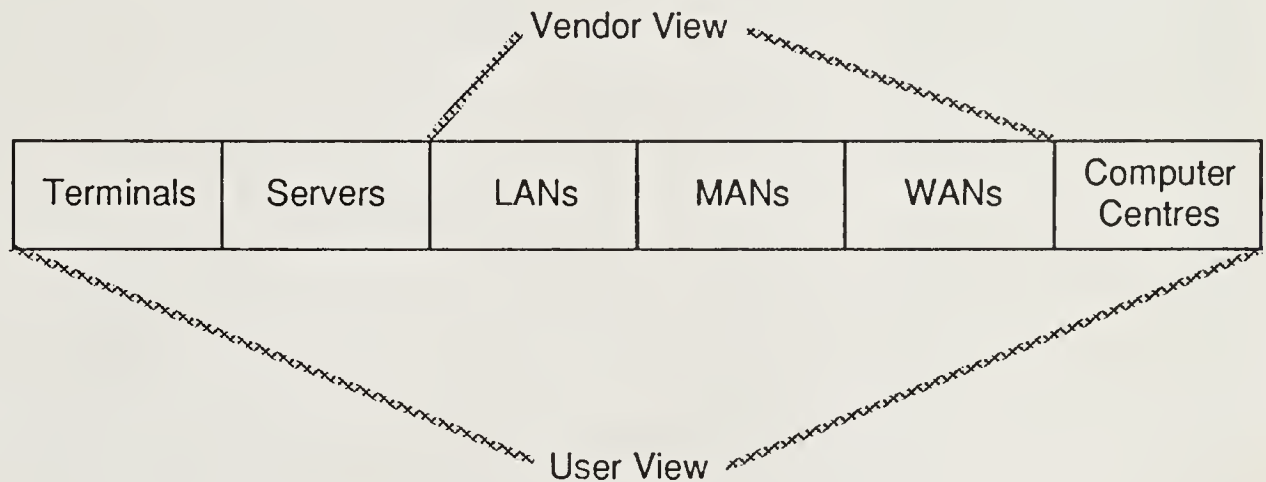
INPUT's report discusses these opportunities and the factors upon which they depend, so that you can better target your sales and marketing activities.

Competitive Positioning

Vendors in the network management market may find that they are competing against different types of companies offering different solutions. It is essential to be able to evaluate your company's position vis-à-vis your competitors and to understand the range of solutions being sold in the marketplace. INPUT's report discusses the potential contributions that various types of vendor can make to the network management market:

- PTTs
- Specialist carriers—for example, mobile radio, radiopaging and satellite broadcasting operators
- Independent network service providers
- Equipment and telecommunications vendors
- Major professional services companies

Networks—A Wider View



- Internal view-user
 - Terminal end-user viewpoint on system
 - Servers, comp—OS networks—MIS concern
- External view—vendor tendency
 - Must widen his view to be aware of all facets of NM market

It is vital that vendors be able to match solutions to users' requirements at a detailed level, and INPUT's report provides guidelines to help vendors ensure that the major issues are addressed.

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mail your order to
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on the back of this brochure

About INPUT

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialisation. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

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EUROPEAN
SOFTWARE AND
SERVICES MARKET
STUDIES

The marketing challenges
of the 1990s

EUROPEAN SOFTWARE AND SERVICES MARKET STUDIES

The marketing challenges of the 1990s

In today's fast moving and competitive software and services industry, it is becoming increasingly difficult to keep up-to-date with the latest issues and trends in the marketplace and to keep abreast of developments from the competition. Executives and managers are under increasing pressure to gain insight into the market, track user trends, collect market size data and position their companies against the competition.

INPUT's reports on the software and services industry can help meet these challenges. Each report covers the European market and contains five-year market forecasts, discusses key trends and issues and identifies and ranks leading vendors.

In addition to these reports, INPUT provides annual subscription services, whereby clients regularly receive reports, bulletins, and advice, and can attend informal meetings to discuss specific sectors of the industry.

INPUT is an international research and consulting company specialising in tracking developments in the computer software and services industry. Clients include over 100 of the world's most technically advanced companies, including: Digital, IBM, Unisys, Bull, Olivetti, SD-Scicon, Cap Gemini Sogeti, Sema Group, Finsiel and Sligos.

To order the reports, please complete and return the order form at the back, or contact your nearest INPUT office listed on the back of this brochure.

Software and Services Market Reports

**The Western European Market
for Computer Software and
Services, 1989-1994**
(March 1990)

SARE

Price: £1500.00

This report offers a complete view of the software and services market over the forecast period 1989-1994. It provides market sizes for 1988 and forecasts for 1989-1994 in each of six delivery modes: processing services, network services, software products, systems integration, professional services and turnkey systems. The report also provides a breakdown of the market by country, a breakdown of each delivery mode into subsectors, and a discussion of major trends in leading vertical markets.

**The Western European Market
for Computer Software and
Services, 1990-1995**
(Dec. 1990)

MEFOE

Price: £1500.00

This report gives market forecasts for the software and services sector, which includes: applications software, turnkey systems, processing services, systems software, network-based services, systems operations and systems integration.

**Turnkey Systems
Opportunities—Western
Europe, 1989-1994**
(Nov. 1989)

STWE

Price: £1250.00

Falling equipment prices, UNIX, the demand for total solutions and the gradual evolution of a pan-European market during the 1990s are the forces that will reshape the European turnkey market over the next decade. This report provides a clear analysis of the market, describing the key forces and changes over the next few years. It identifies leading vendors, researches attitudes among vendors and users and recommends strategies for market penetration in the 1990s.

**Professional Services
Challenges, 1989-1990**
(Feb. 1990)

SPRE

Price: £1250.00

Quality and improving management skills are two key challenges that professional services vendors need to address. This report concentrates on the market for custom software development and discusses quality issues, the impact of CASE tools and systems integration, and lists client selection criteria for professional services vendors. It also discusses client concerns and recommends strategies to help professional services vendors tackle the issues.

**Professional Services
Opportunities, 1990-1995**
(Nov. 1990)

MEROE

Price: £1500.00

This report updates the market forecasts and growth rates and reassesses the impact of the trends in the market-place on professional services vendors.

**Western European Electronic
Information Services, 1989-1994**
(Dec. 1989)

SNSE

Price: £1250.00

CD ROM is presenting a major challenge to vendors of electronic information services (EIS), and it is vital for vendors of EIS to plan effective marketing and service strategies to remain competitive. The report identifies the trends and developments that will affect the market, such as the proposed deregulation of telecommunications before 1992, and assesses their effects on vendors.

**Software and Support Pricing—
Western Europe, 1989-1994**
(Dec. 1989)

SMSE

Price: £1250.00

The structuring and effective pricing of software product support and maintenance is one of the critical tasks for vendor management as software increasingly becomes the dominant delivery mechanism. This report examines this complex area by looking at the overall environment for software product support and maintenance services, and specifically at the increasingly important midrange sector of minicomputers and workstations. The report is invaluable in helping vendors develop effective pricing policies and successful support and maintenance strategies.

**Workstation Applications
Software, 1989-1994**
(May 1990)

SWSE

Price: £1250.00

The market for workstation applications is the fastest growing sector of the software products market. INPUT's report explains the reason for this growth and how vendors can benefit. It provides an assessment of the market potential, explains user needs and perceptions, and discusses the impact of standards issues, such as UNIX. The report also contains profiles of major vendors.

**European Software Applications
Solutions Opportunities, 1990-
1995 (Sept. 1990)**

MEA0E

Price: £1500.00

The challenge for vendors of software application solutions in the 1990s is to provide integrated products and pan-European support. This report forecasts the size of the market and identifies the fastest growing markets. It discusses the opportunities for vertical market products, cross-industry market products, application software products and turnkey systems. It discusses market issues such as industry standards, quality and integration.

**Systems Software Products—
Western Europe, 1990-1995**
(Dec. 1990)

MEY0E

Price: £1500.00

This report examines the market for systems software products, segmented into systems control products, application development tools and data centre management products. The report discusses trends such as the move towards distributed processing, and assesses the likely effect on the systems software market. The impact of open systems is also discussed.

**Trends in Processing Services—
Western Europe, 1990-1995**
(Nov. 1990)

MEPOE

Price: £1500.00

There will be a major restructuring of the transaction processing market over the next decade. This report will help vendors to understand what changes are taking place and how they are affecting businesses. Research shows that there are significant opportunities available for vendors, despite a decline in growth rate. The report provides market forecasts and vendor rankings, with percentage market shares for each vendor.

**The Challenge of the Single
European Market—1992 and
Beyond (Dec. 1989)**

XNTE

Price: £1950.00

Although the changes brought about by the Single European Act are not going to happen overnight, they are going to have a significant impact on the computer software and services industry. This report assesses the likely development of the software and services market and analyses the potential threat to European companies from the pan-European giants—many of which are American companies. The report identifies the market sectors that vendors believe will be most affected by the change and recommends vendor strategies for the 1990s.

**European Software and Services
Market, 1990-1995—Insurance
Sector (June 1990)**

MEHO

Price: £1250.00

European insurance companies are being forced to fundamentally rethink their whole approach to information systems as they face up to the need to create fully electronic systems to compete effectively in the 1990s. This is leading to an increased demand for software and services, which creates opportunities for vendors offering networking services, specialised software packages and professional services. In the Insurance Sector report, INPUT breaks down the market into life, non-life and reinsurance and discusses the opportunities available in each sector. Regulatory issues affecting the market are discussed, and there is a review of merger and acquisition activity—which is one of the driving forces in the market for software and services in this sector.

**European Software and Services
Market, 1990-1995—Banking
and Finance Sector
(July 1990)**

MEBO

Price: £1500.00

Financial markets will be deregulated by 1993; this is forcing banking and finance institutions to restructure, and at the same time develop new competitive products and services. INPUT's Banking and Finance Sector report explains how banking and finance markets are restructuring and how this will affect software and services vendors. The report contains detailed market forecasts and profiles leading vendors, and recommends vendor strategies for the 1990s in this fast-growing sector.

**European Software and Services
Market, 1990-1995—Discrete
Manufacturing Sector
(Nov. 1990)**

MEBO

Price: £1500.00

Although the determinants of success in discrete manufacturing vary from sector to sector, the need to reduce costs and to improve product quality remain. In addition, heavy emphasis is now being placed on lead times—for both product introduction and order fulfillment—and on increased flexibility of output. INPUT's Discrete Manufacturing Sector report evaluates the impact of these trends on the software and services market. The report contains detailed market forecasts and identifies the key opportunities available.

**European Software and Services
Market, 1990-1995—Process
Manufacturing Sector
(Dec. 1990)**

MEBO

Price: £1500.00

This companion volume examines the issues and trends in the process manufacturing sector and assesses their impact on the software and services market. The report contains detailed five-year market forecasts and identifies the key opportunities available.

**European Software and Services
Market, 1990-1995—Retail and
Wholesale Distribution Sector
(Nov. 1990)**

MEBO

Price: £1250.00

This report analyses the market for software and services in the distribution industries of Western Europe. It identifies the major trends, issues and opportunities for vendors, and provides market forecasts for wholesale and retail activities in France, Germany, Italy, Spain, the U.K. and the rest of Europe.

Customer Service Market Reports

Fourth-Party Maintenance Opportunities in Western Europe, 1989-1994

(July 1989)

CFPE

Price: £950.00

This report defines and identifies the fourth-party maintenance market in Western Europe and forecasts market size and growth opportunities in five major European economies: the U.K., Benelux, France, Italy and Germany. The report discusses factors that are influencing the market and summarises opinions from fourth-party maintenance vendors about market dynamics.

Quality Issues in Western European Customer Services

(June 1989)

CQUE

Price: £1000.00

This report identifies the major issues related to service quality of Western European customer services. It analyses the relationship between a vendor's service quality image and its service performance. The report also discusses progress in implementing formal service quality standards (ISO 9000).

Customer Service Annual Reports—1990

(Dec. 1990)

CEUSO-UMO-UPO

Price for each report: £1500.00

A separate annual report is available for each of three sectors—large systems, medium systems and PCs and workstations. The reports provide valuable insights into client satisfaction levels with a range of service elements. The reports assess trends by country and by vendor, and analyse the strengths and weaknesses of customer service. The data for these reports comes from over 1,600 user interviews in Europe.

Pricing Issues and Trends in Western European Customer Service (Dec. 1990)

CEPRO

Price: £1500.00

A critical task for the service vendor is to balance service quality with the price users are prepared to pay for it. This report examines the issues and trends in European customer service pricing and can assist vendors in planning effective pricing strategies for the 1990s.

The Challenge of Network Service in Customer Service (May 1990)

CESIN

Price: £1500.00

Data communications networks continue to become increasingly critical to user support organisations, but the service and support necessary to maintain uptime and accessibility remains fragmented. This report provides service vendors with the information they need to plan strategies for implementing a successful service offering. The report gives market size and forecast, reveals user needs and discusses vendor issues and available opportunities.

Independent Maintenance—Western Europe, 1990-1995 (July 1990)

CEIMO

Price: £1500.00

The next decade is crucial for independent maintenance vendors. They are still gaining market share, but as newer and more reliable equipment leads to a decline in service revenues from computer maintenance, independent vendors will have to be able to offer services such as software support, environmental services, and network servicing in order to maintain growth rates. This report recommends a strategy for IBM vendors, gives market sizes, and profiles over 60 leading European independent maintenance vendors.

**Systems Support Opportunities
Customer Services—
Western Europe, 1990-1995**
(Sept. 1990)

CEPRS

Price: £1500.00

Systems operations (facilities management) and disaster recovery markets can provide the key to combatting declining equipment maintenance revenue growth. This report examines these markets (giving market size and penetration by major European country), proposes a strategy for entering these markets, and identifies companies already active in systems operations and disaster recovery.

**Western European Customer
Services Market Analysis and
Forecast, 1990-1995**
(Dec. 1990)

CESMO

Price: £1500.00

This report analyses and forecasts user expenditure for customer services in Western Europe. Revenue figures are split by vendor type (equipment vendors, TPM vendors, dealers and distributors), by service sector (hardware service, software support, professional services, dealers and distributors), by size and by country. Leading vendors are ranked by revenues, enabling customer service organisations to assess their own positions in the market.

Service Update International
(12 monthly issues)

CEQSR

Annual subscription: £1100.00

This is a monthly newsletter which tracks developments in the European and American customer services market. The newsletter keeps customer service companies up-to-date with mergers, acquisitions, contracts and new service offerings.

Network Services Market Reports

**Managed Network and
Messaging Services, 1990-1995**
(Nov. 1990)

NEMSO

Price: £1500.00

This report covers the market for services such as protocol conversion services, X.25 packet assemblers and disassemblers, and local-area network services. The report covers all the major European countries and reviews third-party vendors selling messaging services. The report discusses key issues such as the rapid development of strategic alliances between telecommunications and software and services companies. It also considers the planned deregulation of the EEC telecommunications markets.

**Western European EDI
Developments, 1990-1995**
(Dec. 1990)

NEEDO

Price: £1500.00

This report examines the opportunities available to vendors of electronic data interchange services. It covers all major European countries, profiles leading vendors, and identifies the challenges that vendors are likely to face over the next five years—such as the need to be able to offer an EDI service which handles all classes of networks on an end-to-end basis.

**Western European Network
Services Markets, 1990-1995**
(Feb. 1991)

NENSO

Price: £1500.00

This report provides an analysis and forecast for the network services sector of the software and services market. The network services market is segmented into network applications (managed network services, messaging services, EDI and other application services) and electronic information services (on-line databases and news services). The report provides forecasts for industry-specific and cross-industry expenditures, as well as profiles and market share analysis of leading vendors.

**Financial Network Services—
Western Europe, 1990-1995**
(Oct. 1990)

NEFNO

Price: £1500.00

The movement towards the deregulation of basic telecommunications carriage will open up a highly competitive market, as banks, service providers and network operators look to increase their market share. This report examines the effect of the proposed deregulation and assesses the opportunities available for vendors. Profiles of leading vendors illustrate the different marketing and service strategies.

Systems Integration Market Reports

**Systems Integration Market
Forecast—Western Europe,
1990-1995 (Dec. 1990)** SEIMO

Price: £1500.00

This report examines demand and market forces in Europe for systems integration. For each country market, the report estimates the market size, forecasts market growth and identifies the leading vendors. Systems integration is defined as vendor management of a project that provides a complete solution to a complex information system, networking, or automation requirement.

**Systems Integration Vendor
Issues—Western Europe, 1990-
1995 (Nov. 1990)** SEIVO

Price: £1500.00

This report examines the European systems integration market from a vendor point of view, identifying and commenting on the major challenges that face systems integration vendors. This report makes recommendations to vendors already active in the market and to those currently outside the market.

**Systems Integration User
Perspectives—Western Europe,
1990-1995 (Feb. 1991)** SEIUO

Price: £1500.00

This report examines the trends that are affecting the systems integration market from a user's point of view. It investigates the major issues in industry markets that are leading users to offer systems integration contracts, and examines user attitudes and concerns about selecting a vendor.

Systems Operations Market Reports

**Systems Operations Market
Forecast—Western Europe,
1990-1995 (Oct. 1990)** SESMO

Price: £1500.00

Systems operations (facilities management) is one of the smallest but fastest growing sectors of the European software and services market. This report examines the demand and market forces in each European country market. Leading vendors are identified and market size and growth rates are forecast. The report also identifies the impact of systems operations on other markets in the software and services industry.

**Systems Operations Vendor
Issues—Western Europe, 1990-
1995 (Oct. 1990)** SEEVO

Price: £1500.00

This report examines the market trends affecting the systems operations (facilities management) market from a vendor point of view. It examines the effect of trends on vendors and discusses the impact for vendors who have not entered the market. It also discusses the main issues of bidding for and managing systems operations contracts and identifies necessary vendor skills.

**Systems Operations User
Perspectives—Western Europe,
1990-1995 (Jan. 1991)** SESUO

Price: £1500.00

This report identifies user attitudes and assesses their significance for systems operations vendors. The report examines, from a user's point of view, the main issues in contracting out the

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Les Marchés des Logiciels & Services, 1991-1996

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 - Services de Traitement
 - Prestations Intellectuelles
 - Intégration de Système
 - Systems Operations—FM
 - Services de Réseaux
 - Projections 1991-1996
- Analyse des Offreurs
 - Parts de marché
 - Profils détaillés des 10 principaux acteurs
 - Actionnaires, dirigeants
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Le Marché des Logiciels et Services, 1991-1996

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Le Marché des Logiciels et Services, 1991-1996

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Bénélux

Le Marché des Logiciels et Services, 1991-1996

Belgique - Pays-Bas

Europe du Nord

Le Marché des Logiciels et Services, 1991-1996

Norvège - Suède - Finlande - Danemark

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Le Marché des Logiciels et Services, 1991-1996

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Les Marchés des Logiciels & Services en Europe, 1991-1996

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Pour Optimiser Votre Approche Verticale des Marchés

La Banque, l'Industrie, la Distribution, l'Assurance sont parmi:

- Vos domaines d'intervention actuels
- Vos cibles de demain

Pour chacun de ces secteurs vous recherchez des statistiques et des analyses actualisées sur

- Leur environnement économique
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- La dépense en Logiciels & Services
- Les perspectives des marchés, 1991-1996
- Les principaux acteurs
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5 RAPPORTS SONT DISPONIBLES SUR LES SECTEURS...

Industries de Fabrication—Discrete

- Introduction
- Aperçu du marché en Europe
- Analyse par sous secteur d'activités, par pays
- La demande par type de prestations
 - Logiciels Système
 - Logiciels Applicatifs
 - Services de Traitement
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- Prévisions, 1991-1996
- Le CIM—Facteurs de croissance, freins, type de projets, rôle du partenariat
- Stratégie des offreurs, parts de marché
- Perspectives des utilisateurs
- Opportunités

Parution—Avril 1991

Industries de Transformation—Process

- Introduction
- Aperçu du marché en Europe
- Analyse par sous-secteur d'activités, par pays
- La demande par type de prestations
 - Logiciels Système
 - Logiciels Applicatifs
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- Enjeux pour les offreurs, Constructeurs, SSII, Sociétés de logiciels: UNIX, progiciels, réseaux...
- Besoins des utilisateurs
- La logistique: facteurs de croissance, activités concernées, étude de cas

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Les Marchés des Logiciels & Services en Europe, 1991-1996

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<input type="checkbox"/> 1 rapport:	13.500	15.800
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- Profils d'acteurs:
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 - Management Data
 - D-SCICON
 - Sema Group
 - WINTER Partners

Parution—Octobre 1991

Assurance

- Introduction
- Aperçu général du marché et de son environnement Européen
- Analyse du marché par type de prestations
 - Logiciels Système
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 - Services de Traitement
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- Analyse par pays
- Profils d'acteurs:
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 - Paxus
 - CAP Gemini Sogeti
 - IBM
 - Sherwood Computing Services
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Parution—Juillet 1991

Distribution

- Introduction
- Analyse du marché et de ses principaux enjeux
- La demande par type de prestations
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 - Services de Réseaux

- Le marché par pays
- Les acteurs en présence
- Analyse des offreurs de progiciels applicatifs

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Parution—Avril 1991

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Parution—Octobre 1991

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Customer Service Programme—Europe

INPUT[®]

Provides data, analyses and strategic intelligence on customer services issues and markets. It particularly focuses on rapidly developing new service opportunities for customer services organisations.

WRITTEN ELEMENTS:

Research Reports	Delivered in sections as research is completed and then delivered as complete, bound reports.
Research Bulletins	Issued on research in progress.

TYPES OF ANALYSES

Market Analysis Reports	Analysis and forecast of user expenditures across the European customer service and independent maintenance markets.
User Trends and Issues Reports	Examination of user issues and trends and levels of satisfaction with customer service.
Professional Services Reports	Discussion and analysis of important opportunities for customer services vendors, such as systems operations, consulting, systems integration and disaster recovery.

SERVICE ELEMENTS:

Enquiry Service	Fulfills short-term research needs through telephone enquiry.
Consulting Support	Provides continuous support, such as consultant's reactions to events, opinions and ideas.
On-Site Visit	Presentation of research results and discussion of issues at client's premises.
Client Meetings	Informal presentations and discussion of research results.

About INPUT

A propos d'INPUT

INPUT, société Internationale, leader dans l'analyse des Marchés des Services liés aux Technologies de l'Information, délivre des études marketing et du conseil à l'ensemble des prestataires impliqués sur ces marchés.

Depuis sa création en 1974, INPUT analyse en permanence les différents segments du marché—prestations intellectuelles et de traitement, logiciels système et applicatifs, systèmes clé en main, services de réseau, services client, intégration de systèmes, FM—et leur pénétration par secteur vertical (banque, assurance, industrie, distribution).

Les interventions d'INPUT peuvent satisfaire des besoins d'informations opérationnels, tactiques et stratégiques (analyse de concurrence, attentes d'utilisateurs, potentiel de marché, recherche de partenaire...).

Les ressources d'INPUT sont accessibles sous forme de souscription à des programmes annuels, d'acquisition d'études multi-clients, de recherches spécifiques et confidentielles, de participation aux conférences spécialisées, d'abonnement à des newsletters.

La société compte plus de 100 personnes dans le monde dont une cinquantaine de consultants, experts sur les Marchés des Logiciels et Services.

INPUT bénéficie de références de clients notoires et parmi les plus importantes sociétés mondiales dont elle accompagne depuis de nombreuses années la croissance.

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Customer Service Programme—Europe

INPUT has been tracking the customer service market in Europe since 1979. Through constant contact with vendors and users, INPUT is able to help customer service executives decide upon the future directions that their customer service organisations should take.

INPUT researches the customer service market annually and provides information on hardware and software maintenance and also focuses on nonmaintenance business activities, such as professional services.

BENEFITS

Subscription to INPUT's Customer Service Programme provides clients with timely information about customer service markets to enable executives to plan effective marketing strategies for the future.

INPUT can help clients:

Size the market

- Target high-growth sectors
- Identify competitors
- Position their organisations against the competition
- Find out how satisfied their clients are with the service you provided
- Formulate effective pricing strategies

THE CHANGING ROLE OF THE CUSTOMER SERVICE DEPARTMENT

Customer service departments can no longer afford to rely on equipment maintenance revenues alone as this revenue stream slows. New revenue-generating businesses must be developed out of the growing needs of users for fuller system support services.

To restructure a large customer service organisation, to enable it to branch out into nontraditional maintenance businesses, is no easy task. Customer service executives need to identify alternative markets and need to consider the implications of entering these markets, for example:

- Are new skills required?
- What organisational changes are needed?
- Who will our competitors be?
- How should we price our service?
- How do we market our service?

INPUT's Customer Service Programme can assist executives in answering these questions in the European market.

Customer Service Programme—Europe

PROGRAM DESCRIPTION

MARKET ANALYSIS REPORTS

Western European Customer Services Market Analysis and Forecast, 1991-1996—This report surveys the market for customer services and forecasts user expenditures on equipment and systems software maintenance, professional services and education and training associated with equipment and systems software. The report enables customer service executives to size the market and gain valuable knowledge about differences among countries, and differences in spending among various market sectors.

Independent Maintenance—Western Europe, 1991-1996—Independent maintenance vendors are still gaining market share, but as service revenues from equipment maintenance decline, independent vendors face the challenge of creating alternative, higher-growth revenue streams. This report is crucial for independent vendors and equipment vendors to gain valuable competitive information and an informed view of the future market directions for independent maintenance companies. The report profiles leading independent maintenance companies, sizes the market and discusses market penetration trends.

USER TRENDS AND ISSUES REPORTS

Customer Service in Western Europe, 1991—User Satisfaction Analysis—This set of three reports, covering large systems, medium systems and PCs and workstations, gives customer service executives valuable data on user satisfaction. In 1990, INPUT surveyed well over 1,000 users in Europe. The reports allow vendors to make comparisons with other vendors' ratings, overall European ratings and also allow for comparisons with the previous years' results.

Customer Service in Western Europe, 1991-1996—User Issues—This companion set of reports builds upon INPUT's extensive user research to highlight issues in European customer service. These three volumes cover large systems, medium systems and PCs and workstations, and they provide analysis on clients' attitudes and concerns. The reports provide valuable evaluation of the issues, and give advice and recommendations to vendors based upon the European survey of over 1,000 customer service users.

Customer Service Programme—Europe

INPUT[®]

PROFESSIONAL SERVICES REPORTS

Environmental Services for Western European Customer Services Vendors, 1991-1996—This report can assist customer service organisations that are already involved in providing environmental services or that are considering entering the market. Many customer service vendors are broadening their service portfolios, offering services such as structured wiring, air conditioning and power sources. This is creating an important alternative revenue stream. The report can help vendors consolidate their positions by defining and sizing the market and discussing the opportunities available. User and vendor issues are discussed.

Systems Operations for Customer Service Vendors in Western Europe, 1991-1996—As a high-growth area, this market provides customer service vendors with an opportunity to regain some of the lost revenues caused by a slowdown in the growth from equipment maintenance revenues. The report sizes the market in Europe and identifies vendors already active in this area. It recommends strategies for vendors to enter the market and contains discussion on user issues, so that executives can target the opportunities effectively.

Channel Support Issues in Western European Customer Services, 1991-1996—As more and more sales are derived from indirect channels, important issues are raised. One major concern is that the VARs, dealers and distributors are selling equipment without necessarily having the expertise to support it. This often results in users becoming isolated from the equipment vendors. This report will assist equipment vendors and third-party organisations to avoid some of the pitfalls in supporting their users, and recommends strategies for increasing user satisfaction with service.

Software Support Issues in Western European Customer Services, 1991-1996—Customer service vendors need to extend their levels of software support as they widen their portfolio of services. This report examines the issues of providing full software support for both systems and applications software. The report can help customer service organisations to plan their future strategies for providing full software support by discussing the skill requirements needed, user expectations, and the future direction of software support services.

SERVICE UPDATE

Service Update is a monthly newsletter that tracks developments in the customer service industry. It keeps customer service executives up-to-date with trends in the industry and provides valuable competitive information.

Customer Service Programme—Europe

RESEARCH BULLETINS

Research bulletins, produced during each project, alert you as quickly as possible to the results of INPUT's research studies. Research bulletins communicate key findings concerning issues, trends, new market developments and market analysis and forecasts.

SERVICES

Enquiry Service

Clients can ask questions that are answered by INPUT's consultants. Typical types of questions asked include:

- The size and five-year growth of the U.K. hardware maintenance market in real terms (excluding inflation), divided among large, medium and small systems.
- The market penetration of vendor-provided environmental planning services across various market sectors in Western Europe.
- The range of software support services provided by company x.

Consulting Support

INPUT's experienced consultants are always available to give opinions, reactions to events, and for ideas.

On-Site Visits

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Client Meetings

Meetings, held regularly throughout the year in various European locations, enable INPUT's clients to meet each other and INPUT's professional consultants. At the meetings, research projects are reviewed and market trends and issues are discussed. The format of these meetings (typically 15-20 client participants) and their focus on one or two key areas allow in-depth discussion and full client involvement.

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Systems Management Outsourcing Programme— Europe

INPUT[®]

Provides information on European systems integration and systems operations markets.

WRITTEN ELEMENTS:

Research Reports	Delivered in sections as research is completed and then delivered as complete, bound reports.
Systems Integration Reports	Market forecasts, vendor strategies, marketing and user-related issues and specific technology opportunities for the European systems integration market.
Systems Operations Reports	Market forecasts, vendor strategies, marketing and user-related issues and specific technology opportunities for the European systems operations market.
Research Bulletins	Issued on research in progress.

SERVICE ELEMENTS:

Enquiry Service	Fulfills short-term research needs through telephone enquiry.
Consulting Support	Provides continuous support, such as consultant's reactions to events, opinions and ideas.
On-Site Visits	Presentation of research results and discussion of issues at client's premises.
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Systems Management Outsourcing Programme— Europe



SOFTWARE AND SERVICES MARKETS

An annual subscription to INPUT's Systems Management Programme of research enables executives and managers involved in marketing their companies' systems integration and systems operations (facilities management) capability to be well-informed about the trends in the industry. Vendors need to be aware of what the user issues are, and need to have a thorough knowledge of what the competition offers.

BENEFITS

INPUT's programme of research examines the two related areas of systems integration and systems operations. Although these two markets are relatively small, they are among the fastest growing in the software and services industry. It is especially important to find a reliable source of data about these markets. INPUT's Systems Management Programme clients benefit from INPUT's expertise in this specialised market sector. Clients of the programme can find out:

- How vendors are structuring to be best placed to win systems integration contracts
- How vendors are responding to the need to provide a more complete service
- The effect of skills shortages and new technologies
- What criteria users employ to select a vendor
- Vendor market share
- Market size and growth rates

The research provides systems integration vendors with advice and recommendations on how to be successful in these markets, covering issues such as risk assessment and management, alliances and partnerships. It also provides detailed market forecasts by European country and by industry sector.

The 1990s will see an increase in the requirement for systems integration and systems operations, and INPUT's Systems Management Programme will ensure that vendor companies are equipped to compete successfully in this market.

Systems Management Outsourcing Programme— Europe

INPUT®

PROGRAMME DESCRIPTION

SYSTEMS INTEGRATION REPORTS

Systems Integration Market Analysis and Forecast—Western Europe, 1991-1996—
This report examines demand and market forces in Europe for systems integration. For each country market, the report estimates the market size, forecasts market growth and identifies the leading vendors. The report provides valuable insight into the current market environment and can assist companies with their strategic planning activities.

Vendor Alliances and Strategies in Western European Systems Integration Markets, 1991-1996—
This report examines the European systems integration market from a vendor point of view, identifying and commenting on the major challenges that face systems integration vendors. Bidding for systems integration contracts carries a potentially high risk factor, and the report examines vendor strategies for reducing this risk. It also discusses how vendors are forming alliances to gain the necessary expertise to bid successfully.

Marketing Issues in Systems Integration Markets—Western Europe, 1991-1996—
This report examines the systems integration market from a user's viewpoint, to enable companies operating in systems integration markets to better understand client requirements. The report investigates the major issues in industry markets that are leading users towards systems integration contracts, and examines user issues and concerns about selecting a vendor.

Imaging Opportunities in Western European Systems Integration Markets, 1991-1996—
This report examines opportunities in this exciting, emerging technology. Now that pictures, photographs and film can be stored electronically, a plethora of opportunities is arising for integrating such technology into users' information systems. Computerised personnel records can contain photographs and banks can store copies of cheques. This report sizes the market for imaging systems and identifies leading vendors active in the market, providing valuable competitive information for companies involved in, or considering entering, the market.

Systems Management Outsourcing Programme— Europe

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SYSTEMS OPERATIONS REPORTS

Systems Operations Market Analysis and Forecast—Western Europe, 1991-1996—This report examines the demand and market forces in each European country market. Leading vendors are listed and their market shares identified. The report also examines the impact of systems operations on other markets in the software and services industry. The report provides valuable market size data and competitive information for European companies involved in, or considering entering, the systems operations market.

Vendor Alliances and Strategies in Western European Systems Operations Markets, 1991-1996—This report examines the trends affecting systems operations markets from a vendor point of view. It discusses the main issues of bidding for, and managing, systems operations contracts, and identifies the necessary vendor skills. This report is of value to companies already active in the market, and can also assist those outside the market to understand the effect of trends on their own activities.

Marketing Issues in Western European Systems Operations Markets, 1991-1996—This report identifies user attitudes, and assesses their significance for systems operations vendors. The report examines, from a user's point of view, the main issues in contracting out the operations of an information system. The report analyses these user attitudes, and systems operations vendors can benefit from INPUT's recommendations for vendor marketing strategies.

Network Management in Systems Operations Markets—Western Europe, 1991-1996—Computer systems today increasingly involve some networking capability. This presents particular niche opportunities for systems operations vendors to manage the network on behalf of the user. This report examines the opportunities available in this market, discusses user requirements for network management and assesses the skills that vendors need to be able to offer in order to enter the market.

RESEARCH BULLETINS

Research bulletins, produced during each project, alert you as quickly as possible to the results of INPUT's research studies. Research bulletins communicate key findings concerning issues, trends, new market developments and market analysis and forecasts.

Systems Management Outsourcing Programme— Europe



SERVICES

Enquiry Service

Clients of the programme can ask questions that are answered by INPUT's consultants. Typical types of questions asked include:

- Which are the fastest growing country markets?
- Who are the top five systems integrators in Finland?
- What are the key forces driving the systems integration market in Spain?

Consulting Support

INPUT's experienced consultants are always available to give opinions and reactions to events, and for ideas.

On-Site Visits

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Network Services Market Analysis Programme—Europe

Provides market size data, analysis of issues and trends and identification of new opportunities in EDI, electronic messaging, network management and other network-based services.

WRITTEN ELEMENTS:

Research Reports

Delivered in sections as research is completed and then delivered as complete, bound reports.

Research Bulletins

Issued on research in progress.

TYPES OF ANALYSES:

Market Report

Analysis and forecast of user expenditure in the European network services market.

Topic Reports

Examination of issues, trends and opportunities in specific sectors of the network services market.

User Issues Report

Analysis of the network service market from the users' viewpoints.

SERVICE ELEMENTS:

Enquiry Service

Fulfills short-term research needs through telephone enquiry.

Consulting Support

Provides continuous support, such as reactions to events, opinions and ideas.

On-Site Visits

Presentation of research results and discussion of issues at client's premises.

Client Meetings

Presentations and discussion of research results.

Network Services Market Analysis Programme—Europe

INPUT[®]

An annual subscription to INPUT's network services programme provides executives and managers with the data and analysis they need to plan future directions for their companies. The research programme examines topical issues, such as deregulation of telecommunications carriage in Europe, and also highlights opportunities for vendors in new, emerging areas.

Five-year market forecasts are provided, together with discussion of issues and trends in the market and differences among European countries.

BENEFITS

Clients of INPUT's Network Services Market Analysis Programme can find out about trends and developments across Europe in this specialised sector of the software and services market.

This market is changing rapidly, as new trends emerge and businesses place even greater reliance on their computer systems and the communication links between them. To be at the forefront of this fast-moving market requires detailed knowledge of market sizes, specific opportunity areas and country market differences. An annual subscription to INPUT's Network Services Market Analysis Programme provides executives in the network services industry with the data and analysis needed to make informed, strategic decisions.

Information such as the following enables executives to plan marketing strategies to boost sales revenues:

- Competitive information
- Market size and growth rates
- Driving and inhibiting forces in the market
- Emerging opportunity areas

INPUT's carefully constructed research programme provides a mix of written documents, presentations, meetings and telephone support, so that you can, in effect, extend your marketing department.

Network Services Market Analysis Programme—Europe

PROGRAMME DESCRIPTION

MARKET REPORT

The Western European Market for Network Services, 1991-1996—This report provides an analysis and forecast for the network services sector of the European network services market. The network services market is segmented into network applications (managed network services, messaging services, EDI and other application services) and electronic information services (on-line databases and news services). The report provides forecasts for industry-specific and cross-industry expenditures as well as market share analysis and identification of leading vendors.

TOPIC REPORTS

Western European EDI Developments, 1991-1996—This report examines the opportunities available to vendors of electronic data interchange services. It covers all major European countries, profiles leading vendors and identifies the challenges that vendors are likely to face over the next five years, such as the need to be able to offer an EDI service which handles all classes of networks on an end-to-end basis.

Financial Network Services—Western Europe, 1991-1996—This report examines the new opportunities that will result from the proposed deregulation of telecommunications carriage. The market is becoming more competitive as a result of new players entering the market, so it is even more important for vendors to be knowledgeable. This report provides a complete overview of the current market environment and can make a valuable contribution to strategic planning activities.

Opportunities in ISDN and Other Emerging Technologies in Western Europe, 1991-1996—Continuing developments of telecommunications technology will open up new service opportunities for network services vendors in an increasingly competitive environment. However, user inertia and the complexities of network use present very real difficulties for both users and vendors in fulfilling their potential. This report explores the dynamics of this situation and provides insight into the most profitable market opportunities and the ways they can be exploited.

USER ISSUES REPORT

User Issues in Network Services Markets—Western Europe, 1991-1996—This report examines the network services market from a user viewpoint. It discusses the issues that concern users and analyses their requirements for network services over the next five years. As networks are playing a more critical role in users' information systems, users' demands and expectations are increasing. It is vital for suppliers of network services to understand the changes that are taking place in the market.

Network Services Market Analysis Programme—Europe

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Software and Services Vendor Analysis Programme— Europe

Provides characteristics and descriptions of major software and services companies throughout Europe, enabling clients to gain valuable information about competitors, partners and customers.

WRITTEN ELEMENTS:

Vendor Profiles	Descriptions of software and services vendors delivered monthly, in loose-leaf format, for filing in the binder provided
-----------------	--

SERVICE ELEMENTS:

Enquiry Service	Fulfills short-term research needs through telephone enquiries
Consultant Support	Provides continuous support, such as reactions to events, opinions and ideas

BENEFITS:

A complete guide to the European software and services industry

Probably one of the hardest and most time-consuming tasks of marketing in the software and services industry is to keep in touch with what your competitors are doing. It is often difficult to find the right contact, information is not always forthcoming, and it can be a full-time job keeping it up-to-date. It is also difficult to find a single source of reference that will provide a complete overview of the European market.

INPUT's Vendor Analysis Programme can simplify these tasks for you. It provides, in a set of binders, profiles of hundreds of European software and service vendors. If you need to know who is active in professional services markets in Italy, for example, or if you need to find out if a company has subsidiaries in other countries, then INPUT's Vendor Analysis Programme will be a valuable source of reference.

In addition, the programme will enable you to:

- Target companies for possible partnerships, mergers or acquisitions
- Check details of competitive companies

Software and Services Vendor Analysis Programme— Europe

Gather valuable data about your markets

The strengths of INPUT's Vendor Analysis Programme relate to its extensive coverage of the European software and services industry and its unique categorisation of the companies' revenue sources. Company profiles provide a five-year financial history and an analysis of revenues by INPUT's service delivery modes. These analyses provide a precise and consistent interpretation of the nature of each computer services vendor's commercial activities.

A further strength of the programme is that the profiles not only list products, services and markets served, they also focus on strategic activities. Mergers, acquisitions and recapitalisations are discussed, and unusual trends in services are identified and explained, together with any significant trends in profits.

The Vendor Analysis Programme is a compilation of all the major players in the European software and services industry. This means that clients of the programme can use the information to gather data on the performance of the software and services industry as a whole. Clients can compile market share and overall profitability figures and are able to identify emerging products and services.

PROGRAMME DESCRIPTION

The Vendor Analysis Programme consists of a set of company profiles, providing detailed information on over 400 software and services vendors. Clients receive regular updates and new profiles throughout the subscription period. Clients benefit from a valuable, regular source of information on European competitors and potential business partners. The service is enhanced by the hotline enquiry service where clients can find out about companies not listed in the profiles.

Software and Services Vendor Analysis Programme— Europe

THE PROFILES

Clients will receive a total of 450 profiles during 1991, of which 300 are updates from the previous year, and 150 are new.

The profiles provide information such as the following:

- Complete contact details (full company name, address, telephone and fax number, name of Chief Executive Officer or other principal contact)
- Company history (when it was founded, merger and acquisition activity history, subsidiaries)
- Financial data - five-year financial summary when available
- Strategic directions
- Key products and services
- Industry markets served
- Geographic markets served

SERVICES:

Enquiry Service

Clients of the programme can ask questions that are answered by INPUT's consultants. This service is particularly useful for finding out more about specific companies or for gaining information about companies that are not listed. Typical types of questions asked include:

- Information on competitors (brochures, revenues and subsidiaries)
- Lists of companies in a particular country offering accounting software packages

Consultant Support

INPUT's experienced consultants are always available to give opinions, reactions to events, and for ideas.

Vendor Analysis Programme—Europe is available from INPUT,
1280 Villa Street, Mountain View, CA 94041; Telephone (415) 961-3300.
Detailed description of services and fees also available upon request from INPUT's offices in
New York (201) 801-0050 or Washington, D.C. (703) 847-6870.

INPUT's 1991 Software and Services Vendor Analysis Program— Europe

Yes!

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Subscription to INPUT's Software and Services Vendor Analysis
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INPUT

State Government Information Systems and Services Program

Provides state government agency procurement data as well as analysis of agency information on markets, procurement regulations, technology trends, buying values and opportunities.

WRITTEN ELEMENTS:

State Agency Profiles	Descriptions of needs, issues, requirements, policies and spending patterns, with key contacts and decision makers.
Market Analysis/Forecast	Analysis of major issues, trends, vendors and five-year forecast.
Issue Analyses	Issue and topic analyses on key subjects affecting product or market strategy as indicated by clients.
Opportunity Bulletins	Identification and description of each opportunity with up-to-date status available by "hotline."

SERVICE ELEMENTS:

Telephone Inquiry	Use the "hotline" to obtain answers to your immediate questions.
Consultant Access	Obtain opinions and advice from INPUT's executives and consultants from meetings, mail, and telephone.
Client Conference	Covers INPUT's research and forecasts, presentations by agency and industry leaders, and network opportunities.
Information Center Access	Visit our offices to review material on markets, companies, and issues.

RESEARCH PANEL

Participate confidentially in agency IS issues panel to obtain evaluation, needs, and comparisons.

State Government Information Systems and Services Program

Provides answers about trends and market opportunities in states throughout the U.S. Program information includes comprehensive spending patterns, decision makers, buying values, and opportunities.

BENEFITS

INPUT's State Government Program will help you:

- Capture new state market opportunities
- Understand the impact of market changes
- Support state government market strategy
- Be aware of key trends and issues
- Understand individual agency needs and policies

PROGRAM DESCRIPTION

STATE AGENCY SERVICE PROFILES

Comprehensive profiles of information systems needs, requirements, issues, trends, policies, and spending patterns of major state agencies and departments. Each profile identifies key decision makers, information systems procurement policies, and key contracts.

MARKET ANALYSIS/FORECAST SERIES

An ongoing series of analyses, beginning with a review of the industry the previous year. Analyses performed and delivered throughout the year will include major issues, trends, leading vendors, and a comprehensive annual forecast for the coming five years. Each report will be updated annually, to ensure year-to-year comparison and comprehensive, up-to-date data.

ISSUE ANALYSIS

Issue and topic analysis reports will be prepared on subjects that clients indicate are of key interest. Each report will deal with a single topic or issue that could affect an organization's products or market strategy. Issues could include the impact of federal budget reduction on federally funded projects or whether states will adopt the federal telecommunication standards.

OPPORTUNITY BULLETINS

Opportunity bulletins will be prepared for each opportunity identified during the course of research about state agencies. Once identified, information about the status of the opportunity will be available to clients through INPUT's hotline support service. Opportunity bulletins will be released as they are identified.

State Government Information Systems and Services Program

SERVICES

Telephone Inquiry	The "hotline" inquiry service provides fulfillment of short-term research needs (requiring less than two hours) as well as clarification/amplification of report and presentation data.
Consultant Access	Clients receive continuous support from INPUT's consultants and executives. Call them for reactions and opinions.
State Systems and Services Conference	Two-day conference covers INPUT's state market research. Expenditure forecasts are presented together with presentations by state government and industry leaders on trends, policies, and methods.
Information Center Access	Clients have access to INPUT's information centers which provide extensive information about opportunities and about companies providing services to state governments.

State Government Information Systems and Services Program is available from INPUT,
1280 Villa Street, Mountain View, CA 94041; Telephone (415) 961-3300.
Detailed description of services and fees also available upon request from INPUT's offices in
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INPUT's 1991

State Government Information Systems and Services Program

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INPUT

Software and Services Market Analysis Programme—Europe

Provides reliable information on European software and services markets to enable executives and managers to plan effective marketing strategies for the future.

WRITTEN ELEMENTS:

Research Reports	Delivered in sections as research is completed and then delivered as complete, bound reports.
Research Bulletins	Issued on research in progress.

TYPES OF ANALYSES:

Market Reports	Analysis and forecasts of user expenditures in European software and services markets.
Industry Sector Reports	Examination of issues, trends and opportunities in software and services in the most important industry sectors.
Topic Reports	Research on critical issues in the software and services market.

SERVICE ELEMENTS:

Enquiry Service	Fulfills short-term research needs through telephone enquiry.
Consulting Support	Provides continuous support, such as reactions to events, opinions and ideas.
On-Site Visit	Presentation of research results and discussion of issues at client's premises.
Client Meetings	Informal presentations and discussion of research results.

Software and Services Market Analysis Programme—Europe

INPUT's Market Analysis Programme provides you with detailed information so that you can make informed decisions about your company's future strategy.

An annual subscription answers many of the information needs of company executives in the software and services industry. INPUT has been active in Europe for nearly ten years and has built—and is constantly updating—a large database of industry and user information.

BENEFITS

The need for accurate market information

Executives need a regular source of reliable information, structured in such a way that it can be applied directly to their own businesses. INPUT's Market Analysis Programme can provide this information to help executives plan for the future direction of their companies.

One of the major strengths of INPUT's research programmes is the European coverage. Clients will be able to find out how markets are developing in each European country as well as gain a valuable insight into the overall European market—essential knowledge for conducting business in the 1990s.

Clients can learn:

- Where the best opportunities are for their products and services
- Competitive information
- Market size and growth rates
- Driving and inhibiting forces
- Issues and trends
- Emerging opportunity areas

All of these enable the client to focus sales and marketing efforts.

The European software and services industry is a rapidly changing, fiercely competitive and complex environment. In order to succeed in such a market, executives are under increasing pressure to have detailed information about their companies' target markets. With over 30,000 companies participating in the European software and services market, serving many industry sectors and delivering many different products and services, this is a difficult and time-consuming task. INPUT can help make this task easier and therefore less costly.

Software and Services Market Analysis Programme—Europe

PROGRAMME DESCRIPTION

MARKET SECTOR REPORTS

The Western European Market for Computer Software and Services, 1991-1996—This report summarises the market forecasts for the software and services sector, including: applications software, turnkey systems, processing services, systems software, network-based services, systems operations and systems integration. It provides market sizes for 1990, with forecasts for 1991-1996, and also provides a country breakdown of the market. Each delivery mode is segmented into subsectors.

Processing Services Opportunities—Western Europe, 1991-1996—There will be a major restructuring of the transaction processing market over the next decade. This report will help vendors to understand what changes are taking place and how they are affecting businesses. Research shows that there are significant opportunities available for vendors, despite a decline in growth rate. The report provides market forecasts and vendor rankings, with percentage market shares for each vendor.

Professional Services Opportunities—Western Europe, 1991-1996—This report provides market forecasts and growth rates for the European professional services market and assesses the impact of the trends in the marketplace on professional services vendors. It also discusses users' concerns and requirements so that vendors can evaluate their strengths and weaknesses. The report identifies leading vendors, providing valuable competitive information.

European Software Applications Solutions Opportunities, 1991-1996—This report forecasts the size of the applications solutions market, identifies the leading vendors and discusses the trends affecting the market in each European country. It discusses the opportunities for vertical market products, cross-industry market products, application software products and turnkey systems. It discusses market issues, such as industry standards, quality and integration. The report provides valuable market intelligence for companies involved in selling and marketing software products.

Systems Software Products—Western Europe, 1991-1996—This report examines the market for systems software products, segmented into systems control products, application development tools and data centre management products. The report discusses trends such as the move towards distributed processing and assesses the likely effect on the systems software market. The impact of open systems is also discussed. Companies offering systems software products can find in this report valuable market size and growth data, analysis and competitive information.

Software and Services Market Analysis Programme—Europe

INDUSTRY SECTOR REPORTS

European Software and Services Market, 1991-1996 —Insurance Sector—In the insurance sector report, INPUT breaks down the market into life, non-life and reinsurance and discusses the opportunities available in each sector. Regulatory issues affecting the market are discussed, and there is a review of merger and acquisition activity, which is one of the driving forces in the market for software and services in this sector. Software and services vendors in this sector can gain an accurate overview of the European market for their services in the insurance sector.

European Software and Services Market, 1991-1996—Banking and Finance Sector—INPUT's banking and finance sector report explains how banking and finance markets are restructuring and details how this will affect software and services vendors. The report contains detailed market forecasts, profiles leading vendors and recommends vendor strategies for the 1990s in this fast-growing sector.

European Software and Services Market, 1991-1996—Discrete Manufacturing Sector—INPUT's discrete manufacturing sector report evaluates the impact of trends in this sector on the software and services market. Software and services vendors active in the manufacturing sector will find that this report provides them with detailed market forecasts, identifies the leading vendors and the key opportunities available. The report can make a valuable contribution to vendor companies' strategic planning.

European Software and Services Market, 1991-1996—Process Manufacturing Sector—This companion volume examines the issues and trends in the process manufacturing sector and assesses their impacts on the software and service market. The report will help vendor companies, and those considering entering the market, to plan their future strategies by providing detailed five-year market forecasts and identifying the key opportunities available.

European Software and Services Market, 1991-1996—Retail and Wholesale Distribution Sector—This report analyses the market for software and services in the distribution industries of Western Europe. Software and services vendors can find out what the major trends, issues and opportunities are, and are provided with market forecasts for wholesale and retail activities in France, Germany, Spain, the U.K. and the rest of Europe.

Software and Services Market Analysis Programme—Europe

TOPIC REPORTS

Education and Training—This report surveys developments in education and training in the software and services industry, examining issues such as skills shortages and retraining. This report can help vendors of education and training services to assess the level of interest in various types of training services by examining the requirements for training and providing data on levels of satisfaction with training standards. The report also highlights differences in European countries, and discusses governmental issues.

Software Applications Maintenance—This report examines the specific area of user-written software applications maintenance. It identifies the business opportunities in this rapidly developing business sector of the professional services market. The report also addresses such issues as the use of reverse engineering tools and provides market sizing and competitive information.

UNIX Market Opportunities—UNIX has become an important operating system as suppliers move away from their own proprietary systems. This report examines the opportunities being created in this market for consulting services and other professional services, software products and related areas. The report provides European country market analyses and competitive information.

Collaboration and M & A Issues—As European software and services companies plan their business strategies for the 1990s, many are entering new markets by entering into partnerships and acquisition activity. As companies compete against pan-European giants in a single market, it is becoming essential for them quickly to acquire market penetration into new countries, or to be able to offer new skills. This can be achieved by establishing partnerships or by seeking to acquire companies already operating in target markets. This report examines the issues and discusses the implications of such strategic activity.

RESEARCH BULLETINS

Research bulletins, produced during each project, alert you as quickly as possible to the results of INPUT's research studies. Research bulletins communicate key findings concerning issues, trends, new market developments and market analysis and forecasts.

Software and Services Market Analysis Programme—Europe

SERVICES

Enquiry Service

Clients of the programme can ask questions that are answered by INPUT's consultants. Typical types of questions asked include:

- Information on competitors (brochures, revenues, subsidiaries)
- Lists of companies in a particular country offering CASE tools
- What factors influence the choice of location of an IS company's headquarters?
- What effect will the merger between company x and y have on my business?

Consulting Support

INPUT's experienced consultants are always available to give opinions, reactions to events, and for ideas.

On-Site Visit

INPUT consultants can present and discuss research findings at the client's site, so that the client can relate the research results to his own circumstances. The client can raise specific issues and interests in complete confidence, away from competitors.

Client Meetings

Meetings, held regularly throughout the year in various European locations, enable INPUT's clients to meet each other and INPUT's professional consultants. At the meetings, research projects are reviewed and market trends and issues are discussed. The format of these meetings (typically 15-20 client participants) and their focus on one or two key areas allow in-depth discussion and full client involvement.

Market Analysis Programme—Europe is available from INPUT,
1280 Villa Street, Mountain View, CA 94041; Telephone (415) 961-3300.
Detailed description of services and fees also available upon request from INPUT's offices in
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INPUT's 1991 Software and Services Market Analysis Program— Europe

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U.K. Software And Services Manpower Pricing 1991 Survey

Conducted by
Michael Longy, Principal Consultant, INPUT

A multi-client study,
available from INPUT in quarter 4 1991

- Find out the effect the recession has had on U.K. professional services pricing
- Learn what your competitors charge for software staff by grade
 - Vendors can compare the competitiveness of their offerings
 - A Manpower Charge-Out Index provides a national guide to U.K. professional services pricing levels

Do you know how much your competitors charge for manpower-based software services?

Competitive information is always hard to come by, particularly with regard to pricing. It is vital, however, to understand what your competitors offer and how they price their services, so that you can judge how to price your own services.

INPUT's study, *U.K. Software and Services, Manpower Pricing, 1991* will provide you with charge-out rates in pounds sterling for four types of vendors:

- Computer equipment suppliers
- Major professional services vendors
- Smaller professional services vendors (often specialising in narrow markets)
- Software product vendors

All the data from the 40 to 50 vendor interviews conducted is fully tabulated in the report, allowing you to carry out your own further analysis.

A major strength of this study is that it is exclusively focused on the U.K market, allowing an in-depth assessment of pricing trends and

strategies in the U.K. professional services market.

A National Guide to U.K. Service Pricing Levels

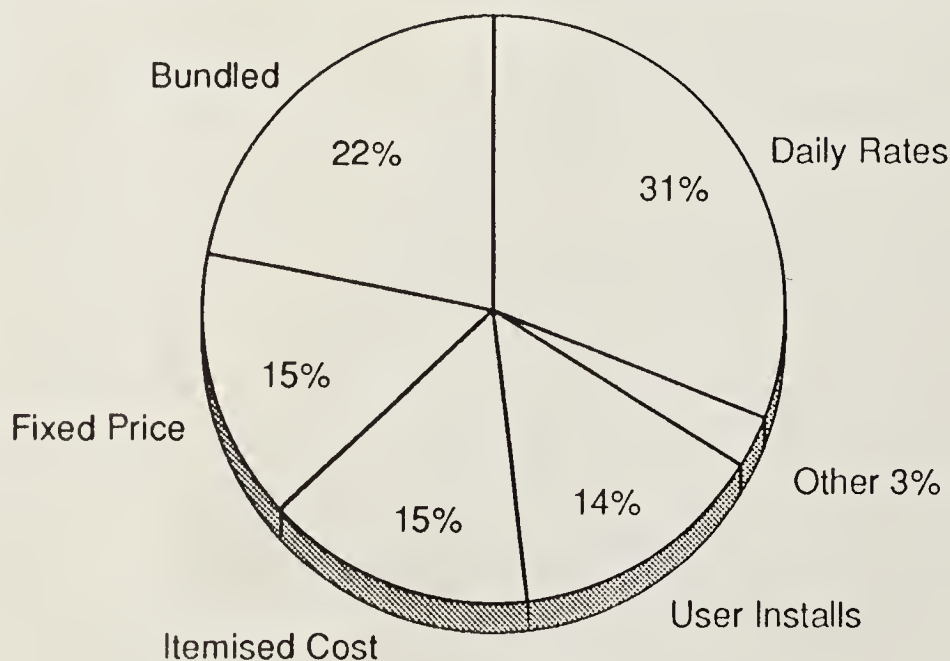
This study will be the eighth in an annual series of reports, previously published by Michael Longy Associates. It provides a five-year view of manpower charge-out rates, allowing for year-on-year comparisons. A Manpower Charge Out Index (MCI) provides an average weighted rise in charge-out rates for the year, giving you a single index as a national guide to service pricing levels in the U.K. software and services industry. This index is a powerful tool that can be used to compare and set competitive rates for long- and short-term software and services projects.

Scope of Study

The study will cover three main areas:

- Rates for software staff analysed by grade:
 - Senior Consultant
 - Project Management
 - Senior Systems Analyst
 - Senior Programmer/Analyst
 - Programmer
 - Rates for software staff analysed by manpower-based task
 - Software installation assistance
 - Software/Systems training
 - Software/Systems maintenance
 - Support policies and trends
- The study will also provide data on changes since last year in:
- sales turnover
 - sales revenue per capita
 - numbers of staff employed

Charging for Installation and Implementation



(Percent of Sample Mentions)

INPUT

Research Studies

Yes!

Please enter my
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U.K. Software and Services Manpower Pricing

☐ £750 if ordered by 30 August 1991

☐ £950 if ordered after 30 August 1991

Standard delivery includes one copy of all reports issued. Clients may purchase additional copies at £350 per copy.

☐ Please send _____ extra reports.

☐ Cheque enclosed in the amount of £_____.

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The total fee is due and payable upon authorisation. UK prices exclude VAT.

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The client agrees to control access to the information provided to prevent unauthorised disclosure in violation of this agreement.

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Title

Date

Date

In-depth Analysis of Data

INPUT will present an analysis of the vendor interviews, discussing the strategic differences among the four vendor groups covered, so that you can understand these differences and the reasons for the changes in pricing from the previous year.

Trends in Manpower-based Tasks

The study will describe the issues and trends affecting each of the four vendor groups for various tasks.

- Installation and implementation

The study will discuss the various methods of charging for installation services by each of the four vendor groups, providing an analysis of the percentage of vendors employing each charging method, such as daily rates, bundled charges, fixed price or user-installed. Vendors will therefore be able to judge the best way to package their own installation services. The study will provide an analysis of how vendors assess profitability levels in providing installation services enabling you to compare your views with those of your competitors.

- Maintenance

This section will discuss differences in warranties offered by each of the four vendor groups and the levels of support contract offered by each. Various charging options are also discussed. You will also be able to find out what facilities are offered by each vendor type, for example, telephone support, enhancements, on-site fixes, and remote diagnostics.

- Training

The study will analyse pricing for four types of courses:

- Standard courses
- Self-study courses
- Customised courses given on customer premises
- Customised courses given on vendor premises

Daily rates are given per student and per trainer, enabling you to evaluate your training operation.

- Tariff Price Increases

Vendors will be asked whether they raised their prices over the last 12 months and whether they plan to do so in the next 12 months. The forecasted price raises will be compared with the actual price raises, enabling you to find out the accuracy with which companies can predict this important part of their strategy. Pressures to discount and trends in discounting will also be discussed.

Pricing Information at Your Fingertips

In this single volume, you will find a wealth of competitive pricing information, segmented by clearly defined grades and tasks. The information can make a real contribution to your annual pricing planning.

A purchaser of last year's report commented,

'I would have found it difficult to do my price review without it.'

To subscribe to *U.K. Software and Services, Manpower Pricing, 1991*, simply complete and return the enclosed authorisation form to INPUT. The study is scheduled for completion during the fourth quarter of 1991.

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INPUT office listed on the back
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About INPUT

INPUT provides planning information, analysis, and recommendations for the information technology industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Subscription services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services. INPUT specializes in the software and services industry which includes software products, systems operations, processing services, network services, systems integration, professional services, turnkey systems, and customer services. Particular areas of expertise include CASE analysis, information systems planning, and outsourcing.

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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INPUT's Second Annual Canadian Information Services Industry Study—1991

- 
- 1991-1996 Forecast
 - Technology Trends
 - Outsourcing Issues
and Opportunities
 - Analysis of Key
Industries
- 

Canadian Information Services Industry Study—1991

1991-1996 Forecast

- 1991 to 1996 user expenditure forecasts and expected growth rates by delivery mode:
 - Processing Services
 - Systems Operations
 - Systems Integration
 - Professional Services
 - Network Services
 - Turnkey Systems
 - Systems Software
 - Applications Software Products

Technology Trends and Issues

- What are information systems executives thinking about:
 - LAN and server installation and integration
 - Cooperative processing
 - Network expansion or consolidation
 - CASE tools
 - Image processing
 - Open systems platforms
 - Application portability?
- Which ones are important? Which ones are not?
- What are the factors that drive or inhibit using new technologies?

Outsourcing Issues and Opportunities

- What are the buyers' attitudes towards outsourcing of systems operations and application management?
 - Who does what now?
 - What are the major areas of opportunity?
 - Why are users considering outsourcing?
 - Downsizing pressures
 - Technology assistance
 - Focus on core business
 - Cost savings
- What concerns must vendors overcome?

Analysis of Key Industries

Manufacturing
Finance (Banking and Trust)
Wholesale (Distribution)
Insurance
Federal Government

- 1991-1996 forecast by delivery mode by industry.
- What are the key driving forces in each industry?

ORDER FORM

YES! I need reliable intelligence about opportunities in the Canadian information services marketplace. I need INPUT's multiclient *Canadian Information Services Industry Study—1991*.

Please supply the relevant information for all three of the following sections and return this form by mail or fax (see below), or call in your order.

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INPUT

Methodology

- INPUT will conduct in-depth interviews with buyers and vendors.
These interviews will allow cross checking between what senior IS executives are thinking and planning and the experienced views of vendors active in each area.
- Other sources of information will supplement the primary research
 - INPUT reports on the U.S. and European markets
 - Trade and business publications
 - Government and industry association information
- Proven quality control and statistical methods will be employed to ensure the highest quality information.

Study Audience

- Vendors currently active in the Canadian information services market who want solid facts to measure performance and to drive product/service business plans.
- Information technology vendors in Canada who are considering expanding into the information services market.
- Information technology vendors outside Canada who are considering expanding into the Canadian information services market.

Study Timing

- Research/analysis will begin in October.
- Results are planned for presentation at a Subscriber Seminar in Canada. The location of the seminar is still to be determined.
- The final report will be delivered 30 days after the seminar.

Schedule of Fees (Canadian Funds)

- Early subscriber price\$9,000
(before September 30, 1991)
- Regular subscriber price\$10,000

Invoiced and payable: 50% at time of order,
50% upon report
delivery

Project Deliverables

- Hardcover report
- Presentation in Canada
- 30 days of telephone support

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INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

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INPUT®

European Software and Services Markets, 1991-1996

Discrete and Process Manufacturing Sectors

INPUT's two new reports will tell you:

- ✓ Market sizes and growth rates for major country markets
 - ✓ Leading vendors and their market shares
 - ✓ Trends and developments impacting the marketplace
 - ✓ Trends in Computer Integrated Manufacturing (CIM) in the discrete manufacturing sector
 - ✓ Business pressures driving process manufacturing companies to examine their logistics systems
- 

Vendors active in the discrete or process manufacturing sectors of the European software and services market need to have a thorough knowledge of the particular issues and trends affecting each sector, and more importantly, how these issues are likely to affect them.

INPUT has two reports, *European Software and Services Markets, 1991-1996 —Discrete Manufacturing Sector* and *Process Manufacturing Sector*, available to help vendors of software products and services accurately target the needs of users in these sectors.

The reports cover the four major country markets in Europe, U.K., France, Germany and Italy.

Vendors will be able to compare developments in each country and will learn the sizes and growth rates of each country market—vital information for companies operating on a Pan-European scale.

Leading Vendors and Market Shares

Both reports list leading vendors, with market shares and estimated revenues from the manufacturing sectors. This is important information for vendors, who can use this data to position themselves against their competitors. The reports also discuss the issues facing vendors, such as the impact of UNIX and the increase in partnerships among vendors in these sectors.

Major Opportunities in Logistics Process Manufacturing: Western Europe

- Long-term planning system
- Warehouse management/automation
- Integration of major applications
- Provision of performance indicators

User Issues

Both reports discuss user perspectives on the market, which helps vendors better satisfy users' needs. In particular, the reports discuss the impact of users becoming more pan-European in their outlook and evaluate the changes that will result. The trend towards computer equipment downsizing is also discussed.

What Are the Opportunities?

The reports discuss the opportunities available to vendors by evaluating each of seven delivery modes:

Processing Services	market forecasts and growth rates
Network Services	discussion of the take-up of EDI
Software Products & Turnkey Systems	market size split by platform size and discussion of application-specific products
Professional Services	trends in consultancy and planning and implementation of IS strategies
Systems Integration	how far manufacturing companies are integrating their systems
Systems Operations	the forces driving users to adopt systems operations

Which Industry-Specific Applications Are in Demand?

Software products and turnkey systems account for a large proportion of the software and services market in the manufacturing sector. INPUT's reports discuss the types of applications in demand, such as:

- Production management
- Supervisory control and data acquisition (SCADA) in process manufacturing
- Shopfloor data capture for manual input and time and attendance recording
- CAD/CAM in discrete manufacturing

The reports examine the demand across different sizes of hardware platforms and discuss the products of some of the leading vendors.

CIM in the Discrete Manufacturing Sector

There is an increasing need for companies in the discrete manufacturing sector to share accurate, up-to-date information both within the company and externally on a need-to-know basis. Many vendors are answering this need with computer integrated manufacturing.

INPUT's report, *European Software and Services Markets, 1991-1996—Discrete Manufacturing Sector*, discusses the developments in the CIM market, examining:

- Standards issues
- The buying process
- The nature of CIM projects
- Vendor strategies.

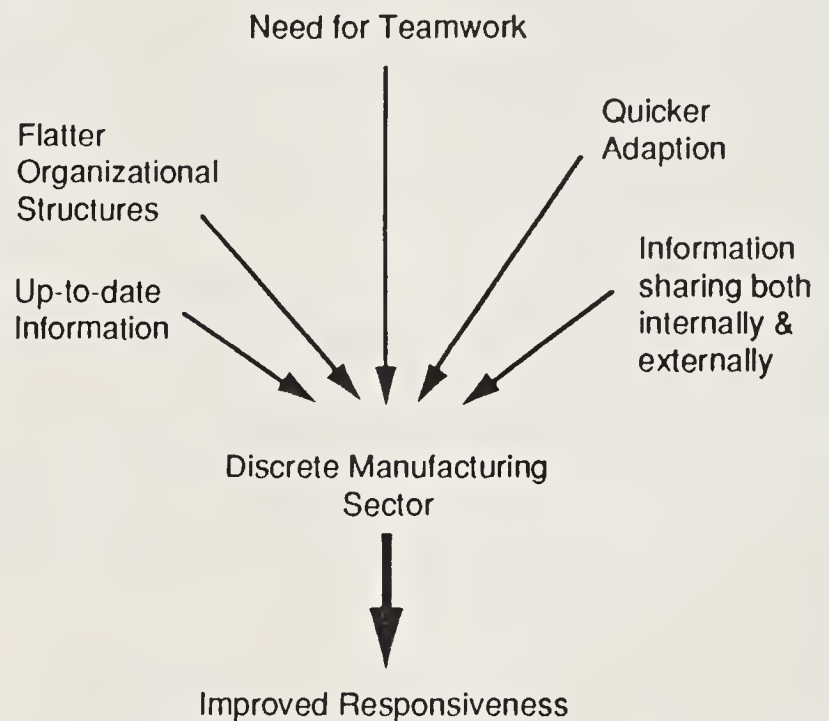
This report provides important market information for vendors supplying such integration services.

Logistics in the Process Manufacturing Sector

European Software and Services Markets, 1991-1996—Process Manufacturing Sector examines trends in distribution logistics, and the management of finished goods in the distribution network of the manufacturer up to the point where they are accepted by a wholesaler, retailer or customer.

The report discusses the business issues—cost pressures and the need to meet tight delivery schedules—that are driving companies to examine their logistics systems. The report indicates which

Driving Forces, Computer Integrated Manufacturing Discrete Manufacturing Sector, Western Europe



subsectors of process manufacturing show the greatest demand for logistics systems, and discusses the ways in which software and services vendors can respond to this demand.

A case study of a food processing company illustrates some of the issues facing process manufacturing companies that retain their own distribution operations.

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Dear Colleague:

Market and Competitive Data on Systems Integration Markets

In times of recession it is essential for vendors to have an accurate picture of how markets are performing and how recession is likely to affect growth prospects. INPUT has just completed a forecast report on European systems integration markets which can help you plan your future strategies. This report provides market size and growth rates for 13 European countries, identifies and ranks the leading vendors and provides in-depth profiles of the activities of six of the major vendors.

Recession in Europe has led to a marked slowdown in growth in the systems integration market, as many major projects have been postponed. However, the market is still being driven by financial pressures that impact organizations. As companies change their business practices to increase competitiveness, there is a corresponding need to realign their information systems rapidly and effectively.

INPUT's report, *Systems Integration Market Forecast—Western Europe, 1991-1996* enables you to find out:

- Driving forces in the market
- The effect of recession
- Market size and growth rates for each of 13 European countries
- Country differences
- Top vendor rankings and market shares for each of 13 European countries
- Opportunities by industry sector

INPUT breaks down systems integration expenditure into four basic components: equipment, professional services, software products and other services (for example, processing). INPUT also estimates in the report the split between projects involving networking and those comprising business applications. This provides an indication of the type of projects that are currently being commissioned.

Competitive Information

INPUT's report provides detailed company profiles on the leading vendors active in the systems integration market in Europe. You can use this information to compare your position in the market with that of your competitors and you can find out each company's strengths and weaknesses and the activities on which they focus.

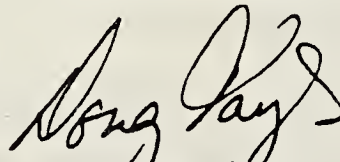
The following companies are profiled:

- Unisys - Complex Systems Organization
- ICL- Secure Systems
- Andersen Consulting
- EDS/SD-Scicon
- Bull

INPUT's report can help your marketing planning process, providing accurate information on the size of the opportunity for systems integration suppliers and detailed strategic information on the activities of your competitors. There is still a growing trend towards outsourcing in the software and services industry which is providing new opportunities for suppliers; INPUT's report provides invaluable assistance in identifying these and analyzing market trends.

To order the report, please complete and return the enclosed order form. I look forward to hearing from you.

Sincerely yours,

A handwritten signature in black ink, appearing to read "Doug Tayler", written in a cursive style.

Doug Tayler
Vice President

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Systems Integration Market Forecast, 1991-1996—

Leading Vendors, 1990 Systems Integration—

- France
- Germany
- United Kingdom
- Italy
- Sweden
- Denmark
- Norway
- Finland
- Netherlands
- Belgium
- Switzerland
- Austria
- Spain
- Rest of Europe

SAVE 10% IF YOU ORDER BY DECEMBER 31, 1991!

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YES!

I need INPUT's report, *Systems Integration Market Forecast—Western Europe, 1991-1996*.

Please complete all three of the following sections and return the form by mail or fax (see below), or call in your order.

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Send me _____ copy (copies) of INPUT's report, *Systems Integration Market Forecast—Western Europe, 1991-1996*.

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INPUT News, lettre de *Nouvelles sur les Marchés des Logiciels et Services Informatiques*, est un abonnement gratuit. Pour recevoir des précisions sur les études présentées dans ce numéro, veuillez retourner cette carte complétée. Je souhaite recevoir une brochure sur les études:

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| <input type="checkbox"/> Industries de Fabrication | <input type="checkbox"/> Customer Services Research Programme—1992 |
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| <input type="checkbox"/> Europe du Sud | <input type="checkbox"/> Pays Germaniques |
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INPUT[®] NEWS

Nouvelles sur les Marchés
des Logiciels et Services

N° 2
Novembre 1991

Rapports:

European Software and Services Market, 1991-1996 by Industry Sector

Entre 1991 et 1996, les marchés européens des logiciels et services connaîtront des taux de croissance différents selon les secteurs:

- Industries de Transformation
- Industries de Fabrication
- Distribution
- Banque et Finance
- Assurance

INPUT, qui vient d'achever cinq études sur chacun de ces secteurs, a observé un taux de croissance significatif sur le marché des assurances.

Parution: 3ème trimestre 1991

Prix/étude: 15.800 FF HT,
13.500 FF HT avant le
31/12/91.

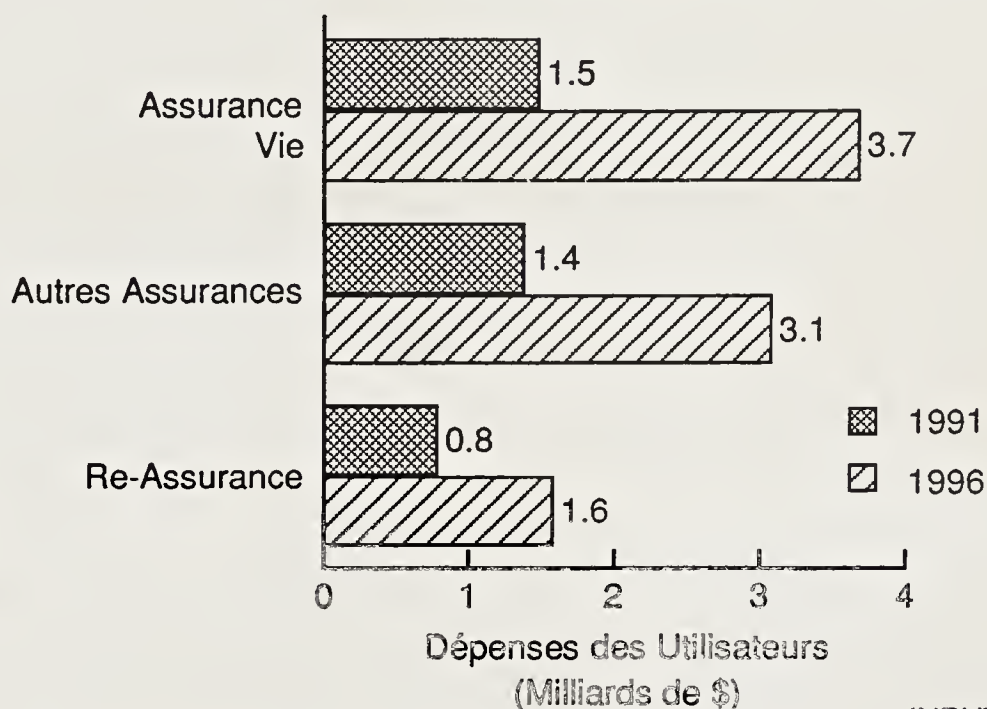
Rapport:

Processing Services Markets—Western Europe, 1991-1996

Les Prestataires de services de traitement semblent être peu touchés par les à-coups de l'économie. En effet, dans un contexte de récession, nombreuses sont les entreprises qui considèrent les services de traitement externes comme une alternative plus économique et plus facilement gérable que des ressources internes.

Par ailleurs, la spécialisation accrue de certaines Sociétés sur des applications (paye, monétique, etc.) augmentera leur avantage concurrentiel dans le futur.

Evolution 1991-1996 de la demande en Europe, Secteur de l'Assurance



INPUT

Les Principaux Prestataires de Services de Traitement Chiffre d'Affaires, 1990, Europe (Millions \$)

IBM	350
Datev	280
Finsiel	245
Sligos	185
Axime	140
GSI	120
Telekurs	115
GEIS	100

INPUT

Cette étude donne une analyse du marché pour les 13 pays d'Europe de l'Ouest.

Parution: Octobre 1991
Prix: 15.800 FF HT,
13.500 FF HT avant le
31/12/91.

Rapport:
The Software and Services
Market, 1991-1996 by
European Regions and by
Countries

Compenser le ralentissement de la croissance annuelle prévue en France sur les marchés français des prestations intellectuelles d'ici 1996 (+ 14% avec un taux d'inflation de 3%): tel est l'enjeu des SSII.

Aussi, l'ouverture sur d'autres pays Européens est-elle essentielle.

INPUT propose cinq études pour optimiser votre développement sur les pays ou régions d'Europe, qui sont vos champs d'action actuels et/ou vos cibles futures:

- Europe de Sud (Italie, Espagne, France)
- Pays Germaniques (Allemagne, Autriche, Suisse)
- Bénélux (Belgique, Pays-Bas)
- Europe du Nord (Norvège, Suède, Finlande, Danemark)
- Royaume-Uni

Parution: Novembre 1991

Prix/étude: 15.000 FF HT,
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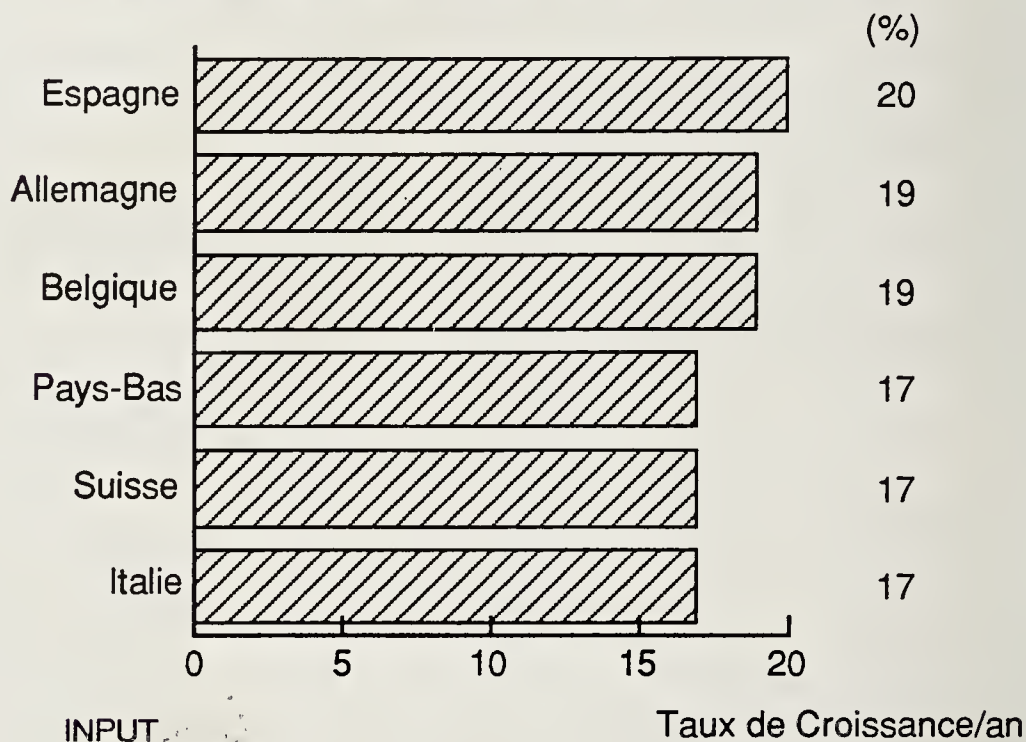
Rapport:
Opportunities in IS Training
In Western Europe, 1991-1996

La formation des utilisateurs représente en 1991 un marché de \$2,5 milliards, qui atteindra \$5,1 milliards en 1996.

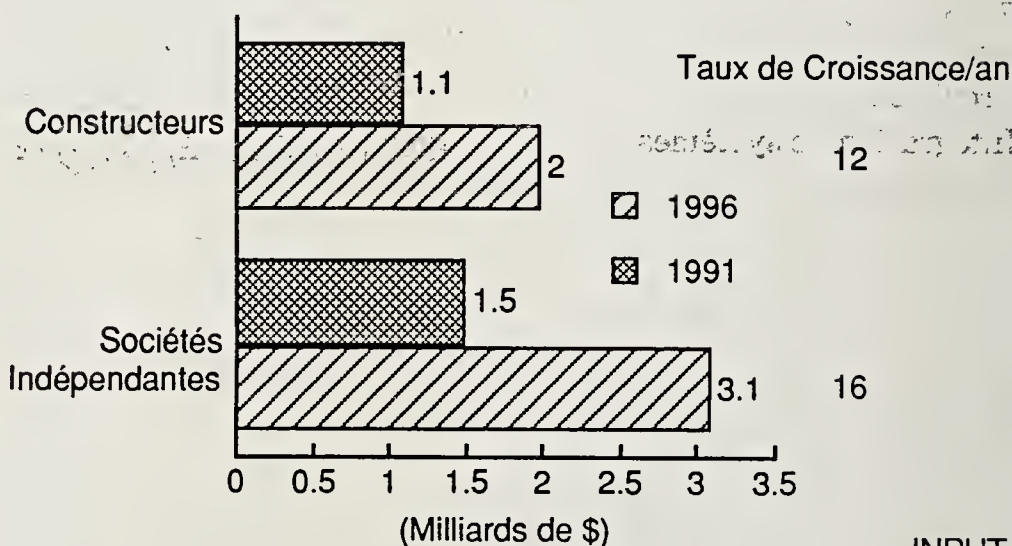
On constate sur ce marché, que la part détenue par les constructeurs s'effrite d'année en année au profit des sociétés indépendantes. En 1996, celles-ci représenteront plus

Les Pays à plus forte Croissance Annuelle,
1991-1996

Marchés des Prestations Intellectuelles



Le Marché de la Formation en Europe
par Type de Fournisseur



de 60% du chiffre d'affaires de la formation dispensée en Europe.

Ce rapport analyse le devenir de la formation et l'impact des nouvelles technologies sur ces marchés.

Parution: Août 1991

Prix: 15.800 FF HT,
 13.500 FF HT avant le
 31/12/91.

Rapport:
Systems Integration
Technology Trends

Nombreux sont les projets d'intégration de systèmes initialisés pour tirer parti des nouvelles technologies et donner un avantage compétitif à leurs utilisateurs. INPUT, dans ce rapport, passe en revue 14 technologies et évalue leur insertion dans les industries, dans les banques et dans les sociétés de distribution.

Parution: Avril 1991
Prix: 13.000 FF HT,
11.000 FF HT avant le
31/12/91

Rapport:
Computer Industry Financial
Watch

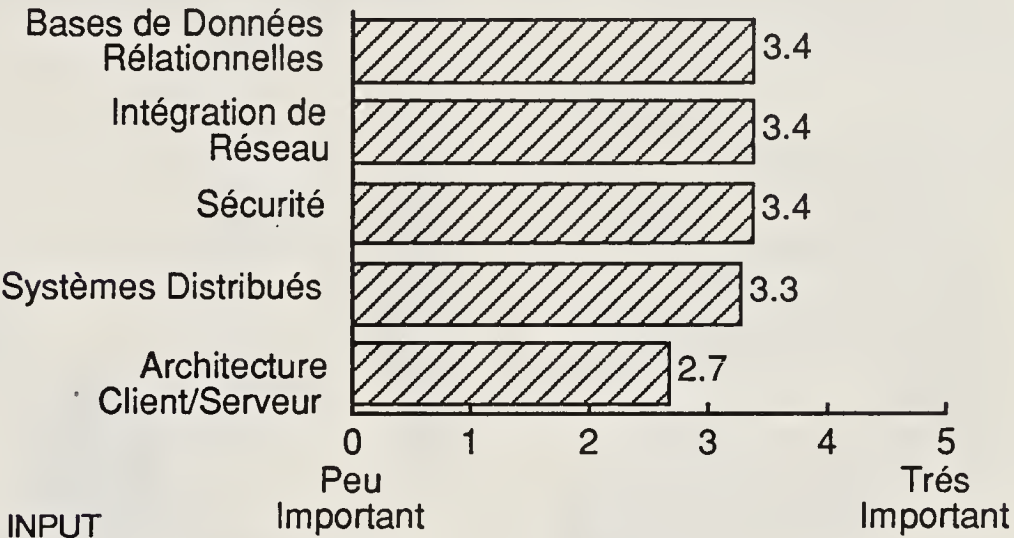
Un "instrument" essentiel pour appréhender, trimestre après trimestre, les performances des 400 principales Sociétés Américaines actives sur chacun des segments du marché des technologies de l'information:

- Réseaux et services de traitement
 - Progiciels
 - Intégration de systèmes
 - Distribution
 - Prestations intellectuelles
- et pour mesurer votre performance relative.

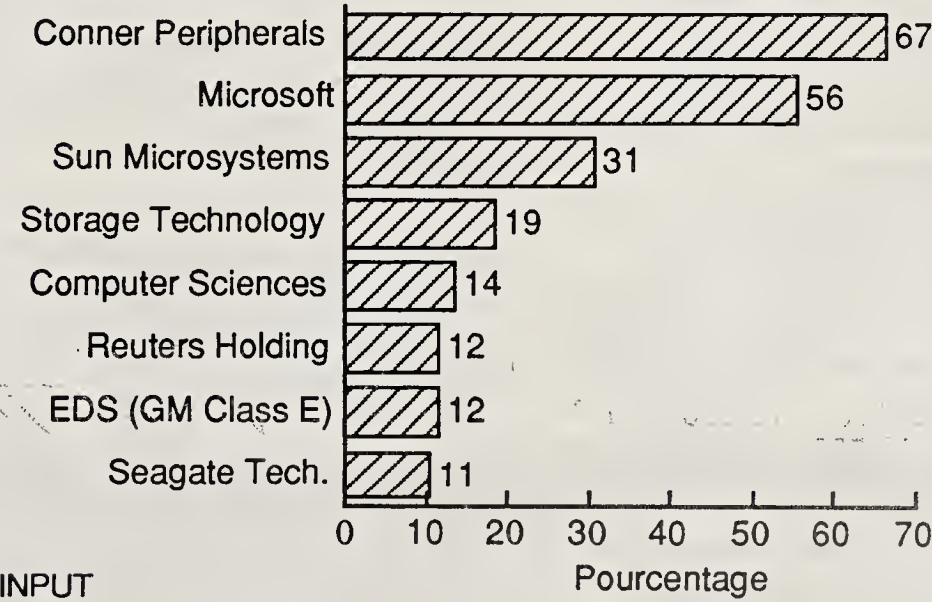
Quatre rapports "Financial Watch" sont publiés chaque année. Les informations et indicateurs financiers qu'ils contiennent, sont accompagnés d'une analyse des tendances à court terme et des facteurs susceptibles d'impacter les marchés.

Abonnement annuel: 2.800
FF HT pour 4 études

Importance des Nouvelles Technologies dans le
Secteur Industriel



Les plus Belles Performances 1990
Croissance du Chiffre d'Affaires



Newsletter:**EDI Reporter International**

Une analyse mensuelle sur les marchés destinée tant aux fournisseurs qu'aux utilisateurs.

Chaque numéro de cette lettre de 12 pages, contient:

- des études sur l'implémentation de l'EDI chez les utilisateurs
- des profils sur les nouveaux produits et les nouvelles sociétés
- des analyses de l'offre
- des statistiques de marché

Abonnement Annuel:
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Consell et études spécifiques:

- Evaluation de marchés
- Analyse concurrentielle
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- Etude de positionnement
- Recherche de produits et de partenaires

France, Europe, USA, Japon et pays du Pacifique

Les études confidentielles et sur mesure représentent une part significative des activités d'INPUT.

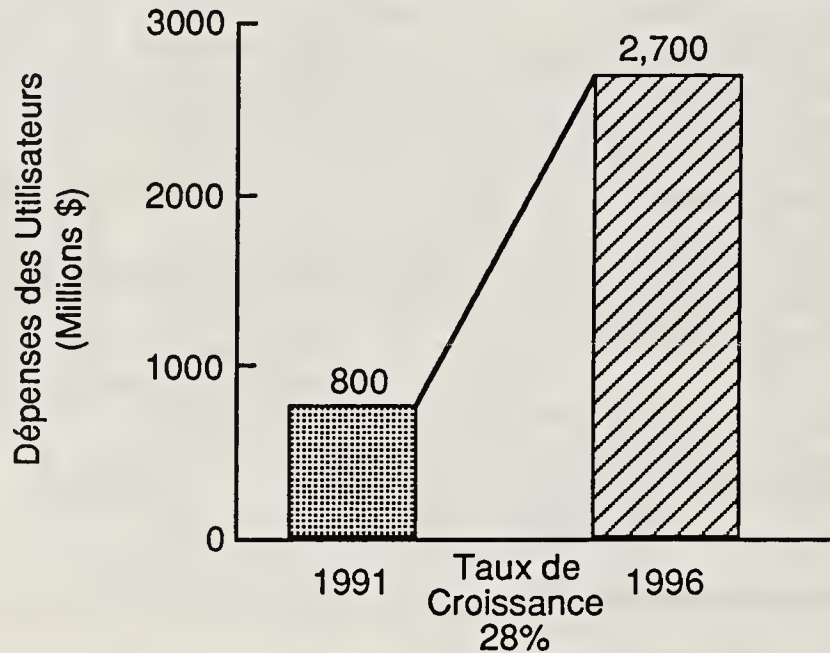
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Evolution de la Demande dans le Secteur de la Santé aux USA pour les Services de Commerce Electronique



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1992 PROGRAMMES DE RECHERCHE EUROPE**Information services Industry Programme 1992**

Toute l'industrie des services par pays, type de fournisseurs, catégorie de prestations, principaux acteurs, etc. Avec des projections 1992-1997.

Customer Services Research Programme 1992

Les marchés de la maintenance matérielle, logicielle et les services associés, appréhendés du côté des utilisateurs et des offreurs, dans un environnement de systèmes hétérogènes, ouverts, multi-plateformes...

Outsourcing Information Services Programme 1991

Un examen approfondi des différentes formes prises par "l'Outsourcing" ou le recours à des prestataires externes, pour la gestion de l'exploitation, des réseaux, des applications, des parcs micro...

Systems Integration Research Programme 1992

Un programme dédié aux développements de l'intégration de systèmes en Europe avec des évaluations chiffrées des marchés et des études détaillées sur les utilisateurs: leurs motivations, leurs processus de décision...

Network Management Services Programme 1992

Les perspectives de marché pour les services associés aux réseaux, les enjeux autour de la gestion des réseaux, les approches sectorielles (EDI, Electronic Commerce...)

